

Labor Market Information Overview

August 21st & August 22nd, 2013

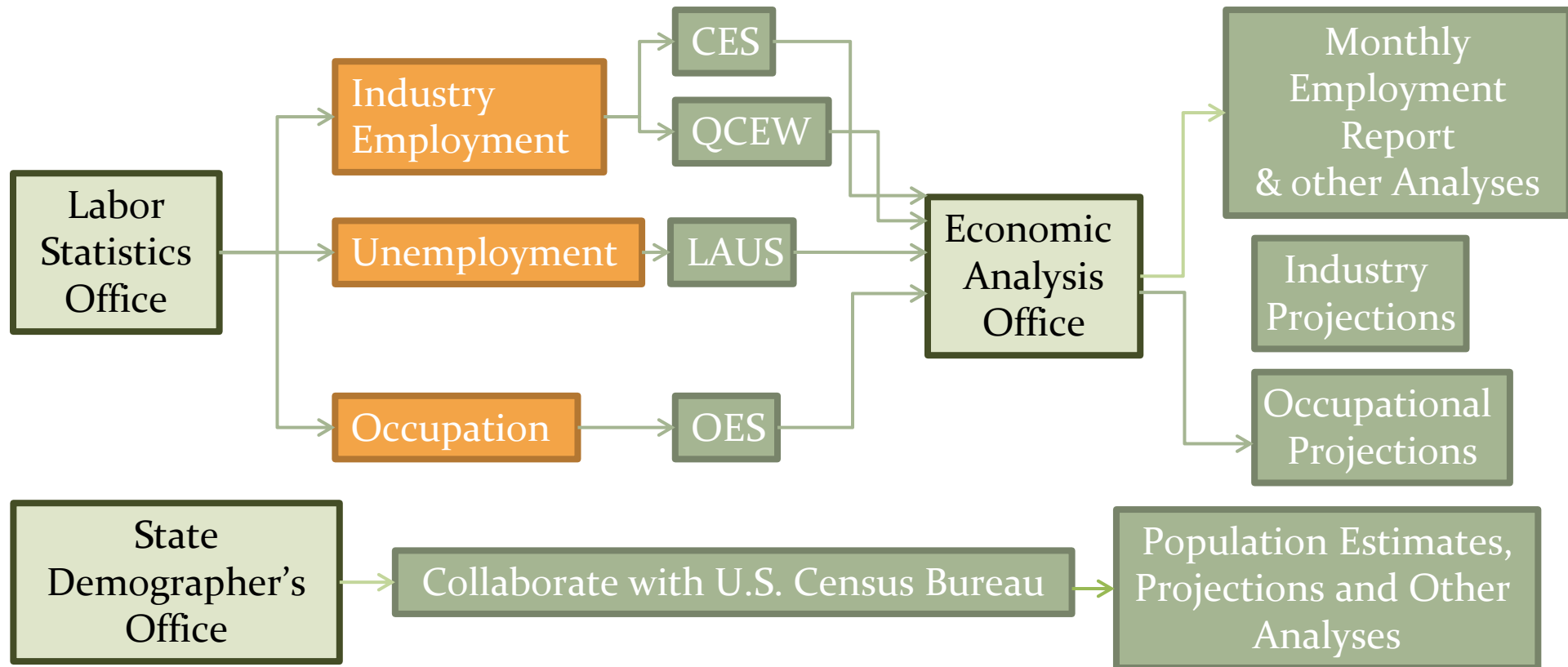
Office of Employment and Population
Statistics,
Arizona Department of Administration



Agenda

- **Who We Are**
- **Demographic Profile**
- **Industry Overview**
- **Jobs Inflow/Outflow**
- **Unemployment Overview**
- **Recession Impact on the Labor Market**
- **Labor Force Overview**
- **Industry Forecast**
- **Occupation Trends and Forecast**
- **Questions**

Office of Employment and Population Statistics, Arizona Department of Administration



www.AZstats.gov

Labor Market Information User Community



Arizona Department
of Administration

Office of Employment
and Population Statistics



The source for labor market and demographic information

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This website provides a wide variety of labor market and demographic information for Arizona, including: local area employment and unemployment statistics; occupation and industry employment estimates and projections; wage survey data; population data; and more. Contact us by phone or email if you need any assistance finding data:

Phone: 602-771-2222

Email for labor related questions: labor.info@azstats.gov

Email for population related questions: pop.info@azstats.gov

U.S. Census Bureau's Economic Census

2012 Economic Census
YOUR RESPONSE
MAKES A
DIFFERENCE

The Economic Census is conducted by the U.S. Census Bureau. It is the U.S. Government's official five-year measure of American business and the economy.

More than 4 million employer businesses will receive Economic Census forms between October and December, 2012.

Learn more at business.census.gov

Arizona Workforce Employment Report

NOVEMBER EMPLOYMENT REPORT

[Unemployment Rate Drops to 7.8%; Above-Average Nonfarm Job Gains](#) (PDF)

December 20, 2012

FORECAST REPORT

2011-2013 Industry Projections

[Arizona Employment Growth Continues on a Modest Track: Improvement in 2013](#) (PDF)

2010-2020 Industry Projections

Arizona Statewide, Phoenix MSA, Tucson MSA & Balance of State [XLS](#) | [PDF](#)

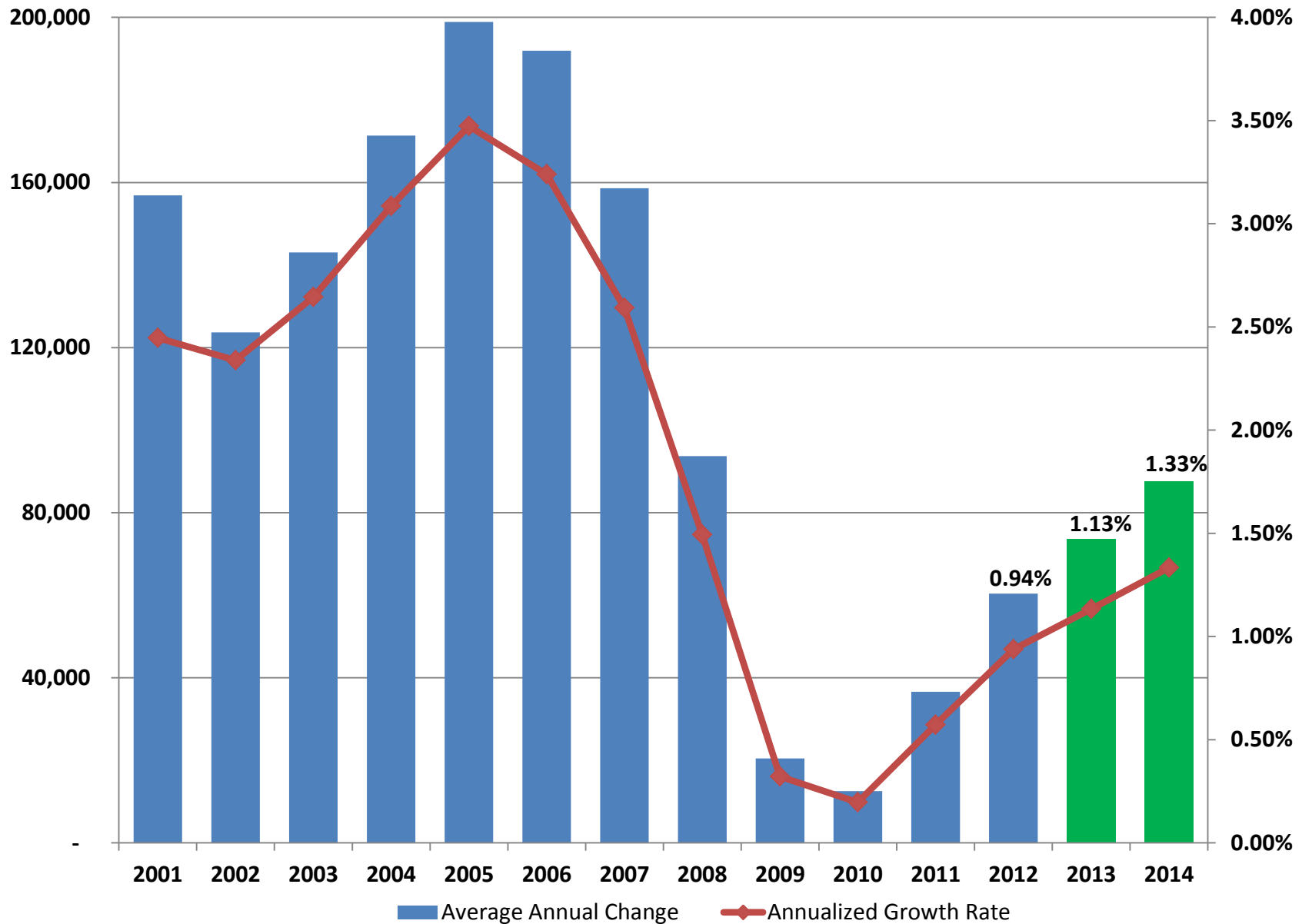
Seasonally Adjusted Unemployment Rate, Nov
2010 - Nov 2012



A light blue map of the state of Wyoming is centered in the background. The map shows the state's outline, including its northern, southern, and eastern borders, and the irregular western border along the Colorado border. A dark blue horizontal banner is superimposed across the middle of the map.

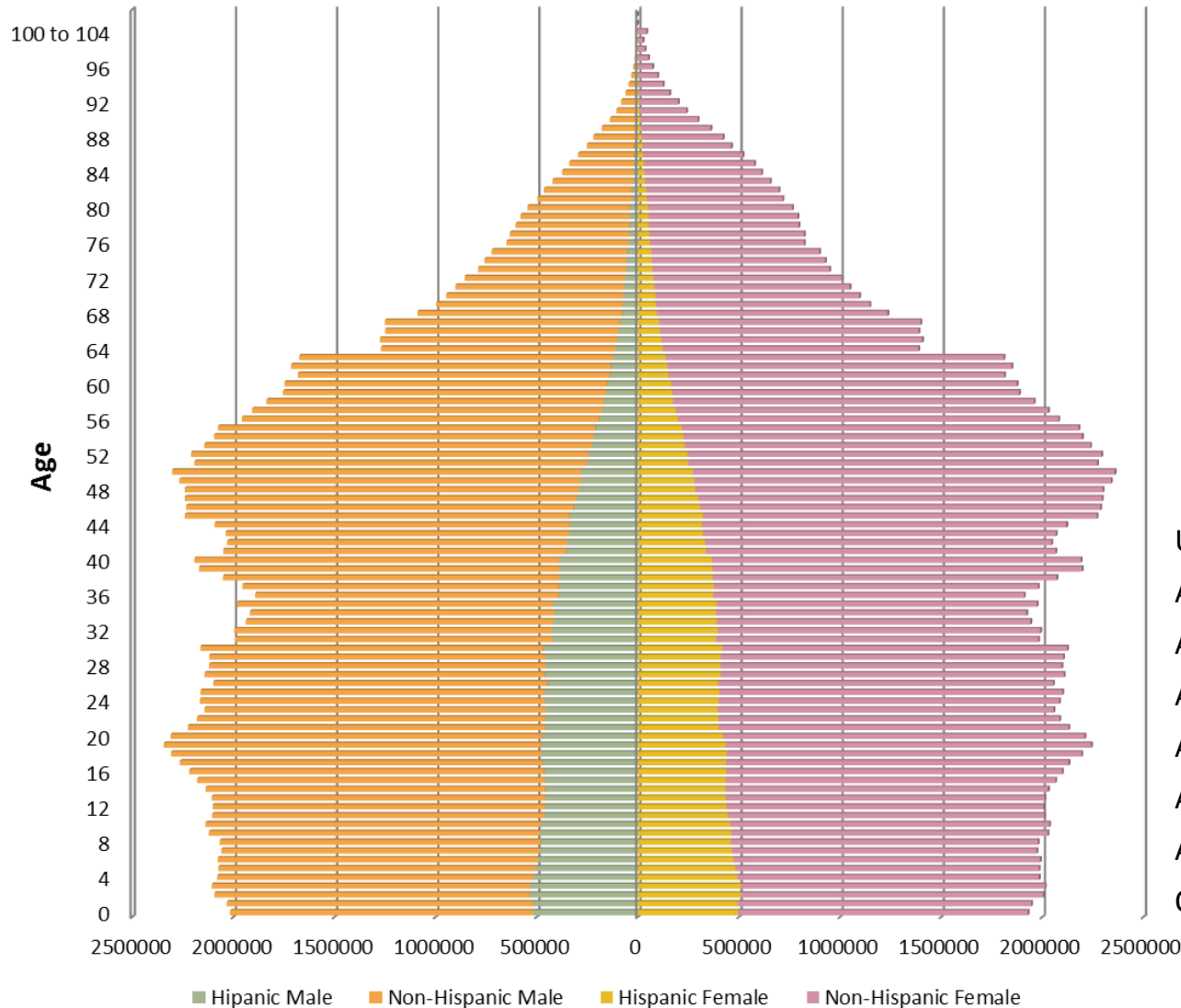
Demographic Profile

Arizona's Population Growth and Growth Rates



Source: U.S. Census Bureau in conjunction
with Arizona EPS

United States



Hispanic

Male

25,618,800

8.3%

Female

24,858,794

8.1%

Non-Hispanic

Male

126,162,526

40.9%

Female

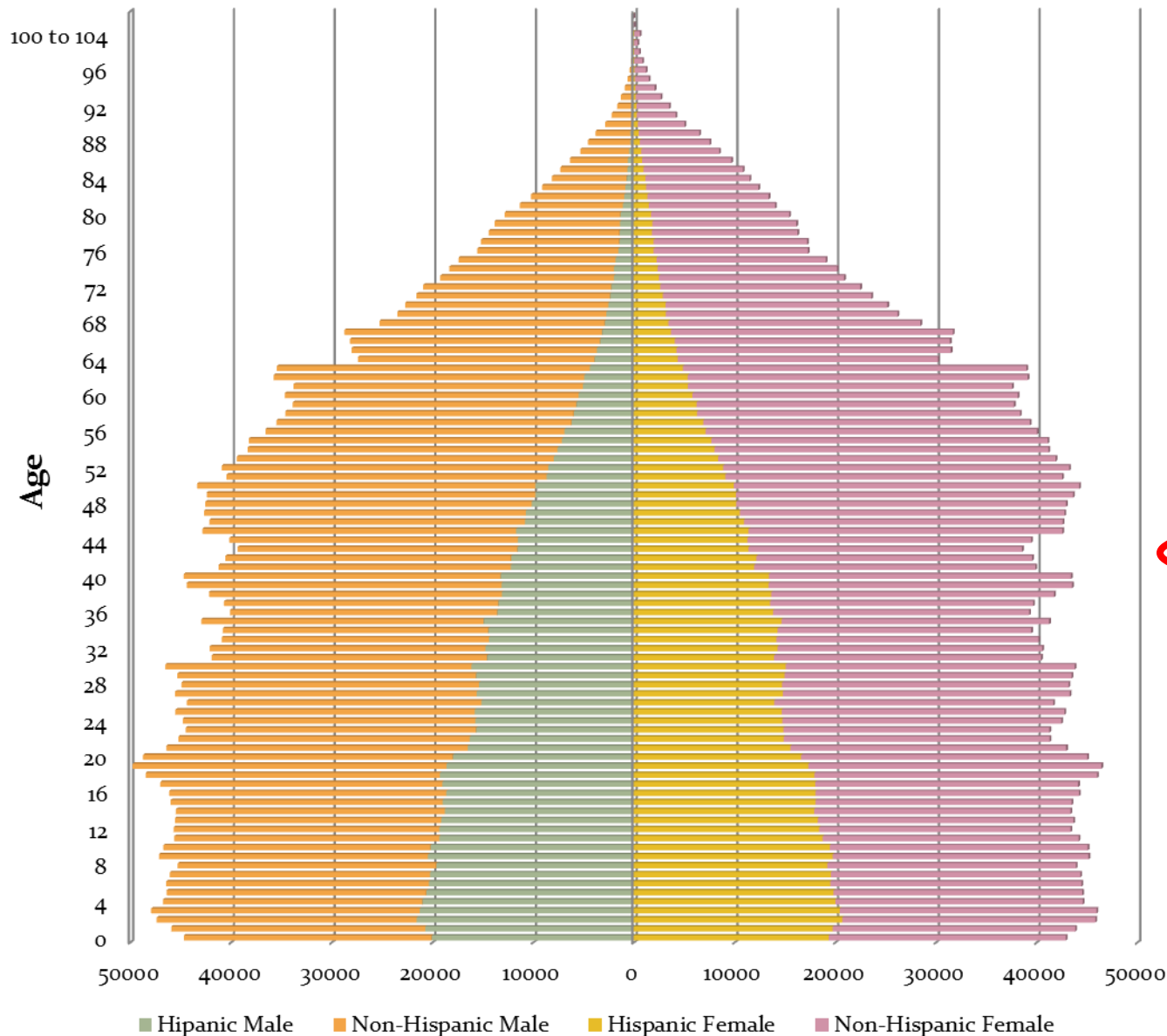
132,105,418

42.8%

Total Population: 308,745,538

Age	Population	Percent
Under 18	74,181,467	24.0%
Age 18 - 24	30,672,088	9.9%
Age 25 - 34	41,063,948	13.3%
Age 35 - 44	41,070,606	13.3%
Age 45 - 54	45,006,716	14.6%
Age 55 - 65	36,482,729	11.8%
Age 65 - 74	21,713,429	7.0%
Over 74	18,554,555	6.0%

Arizona



Hispanic

Male

951,790

14.9%

Female

943,359

14.8%

Non-Hispanic

Male

2,224,033

34.8%

Female

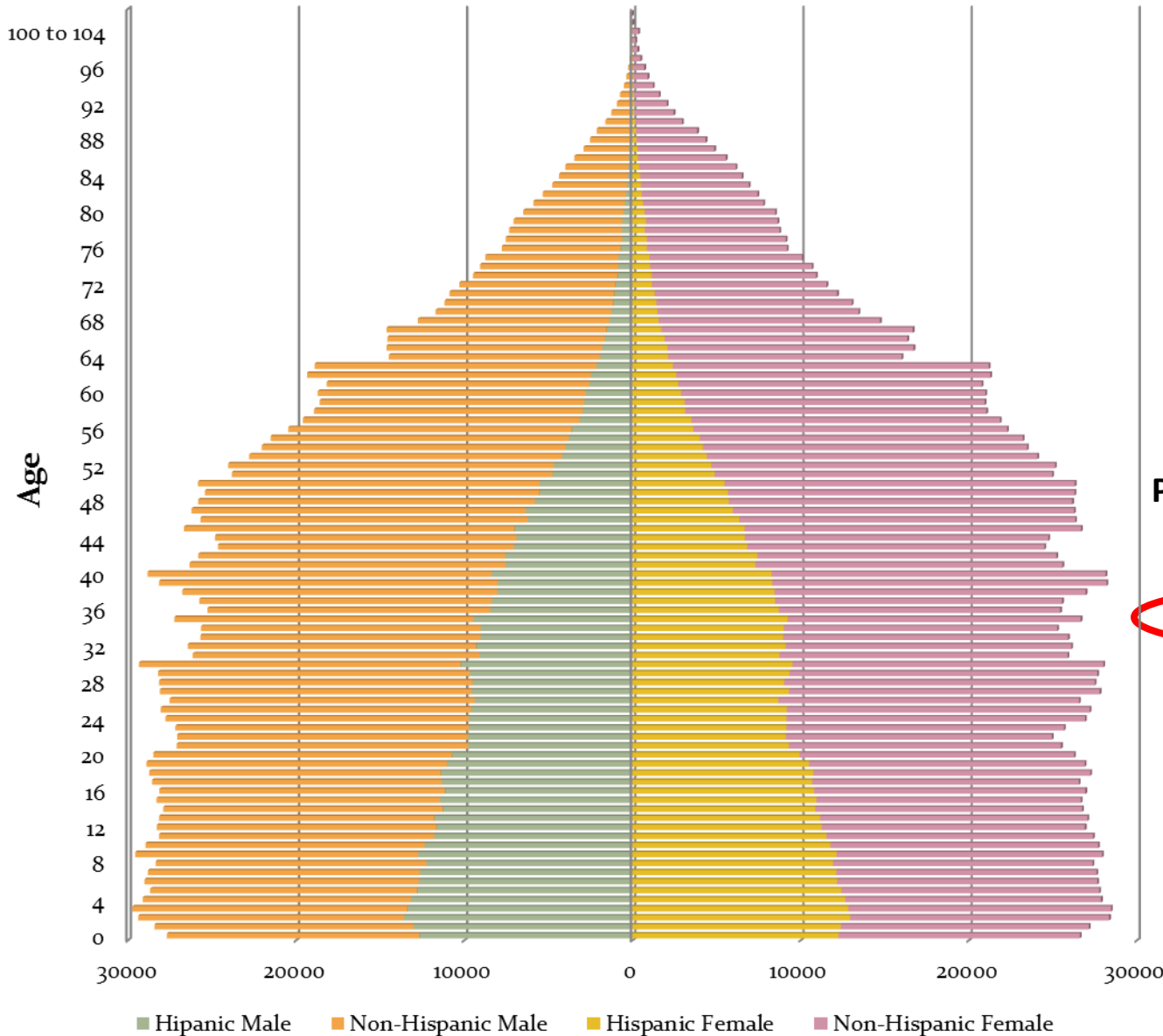
2,272,835

35.6%

Total Population: 6,392,017

Age	Population	Percent
Under 18	1,629,014	25.5%
Age 18 - 24	633,211	9.9%
Age 25 - 34	856,693	13.4%
Age 35 - 44	822,494	12.9%
Age 45 - 54	842,546	13.2%
Age 55 - 65	726,228	11.4%
Age 65 - 74	497,892	7.8%
Over 74	383,939	6.0%

Maricopa County



Hispanic

Male

568,138

14.9%

Female

560,603

14.7%

Non-Hispanic

Male

1,320,327

34.6%

Female

1,368,049

35.8%

Total Population: 3,817,117

Population Share: 59.7%

Age Population Percent

Under 18 1,007,861 26.4%

Age 18 - 24 378,617 9.9%

Age 25 - 34 541,126 14.2%

Age 35 - 44 524,598 13.7%

Age 45 - 54 503,965 13.2%

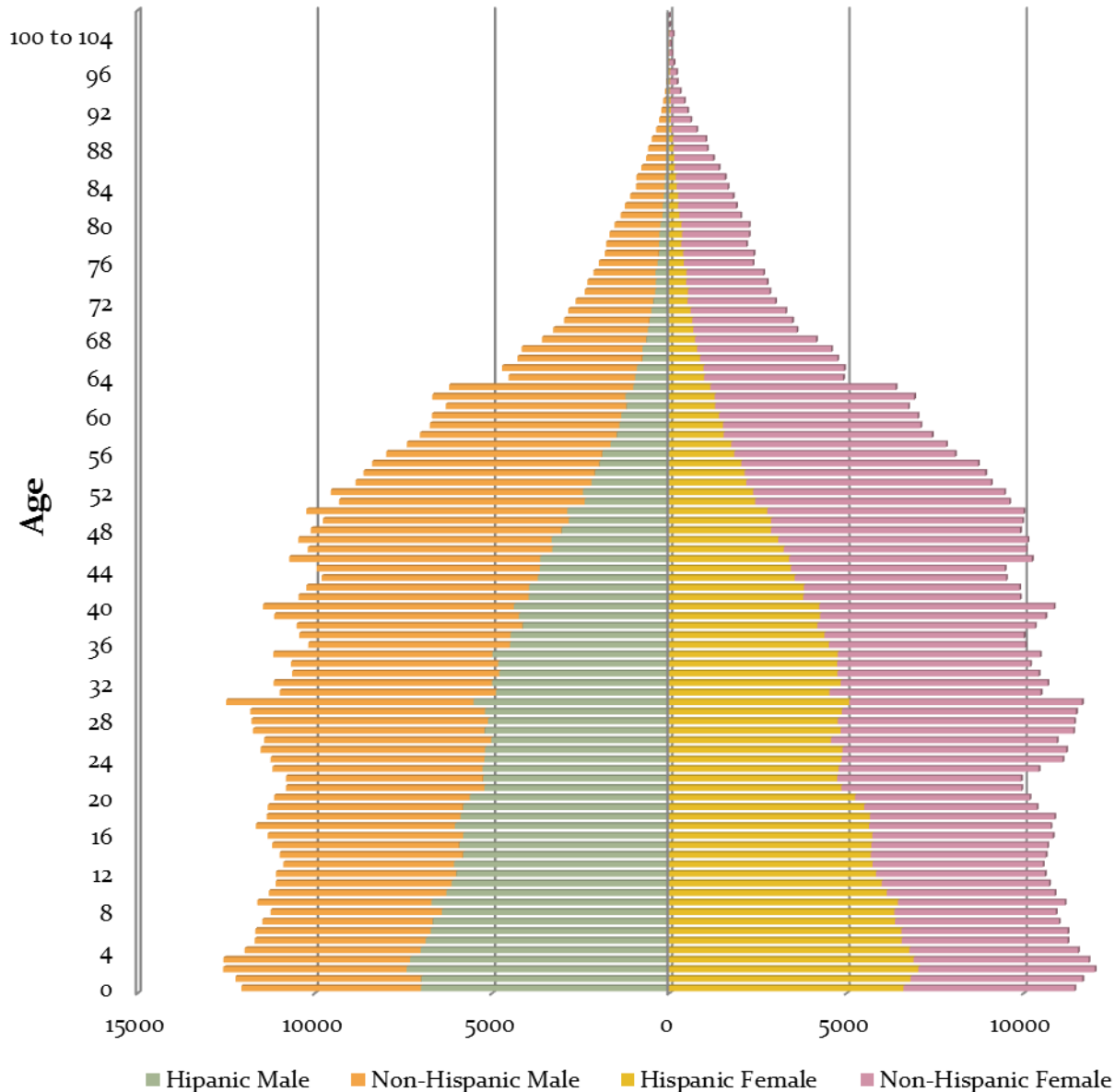
Age 55 - 65 398,309 10.4%

Age 65 - 74 255,388 6.7%

Over 74 207,253 5.4%

Source: U.S. Census Bureau in conjunction with Arizona EPS

Phoenix



Hispanic

Male	Female
298,982	290,895
20.7%	20.1%

Non-Hispanic

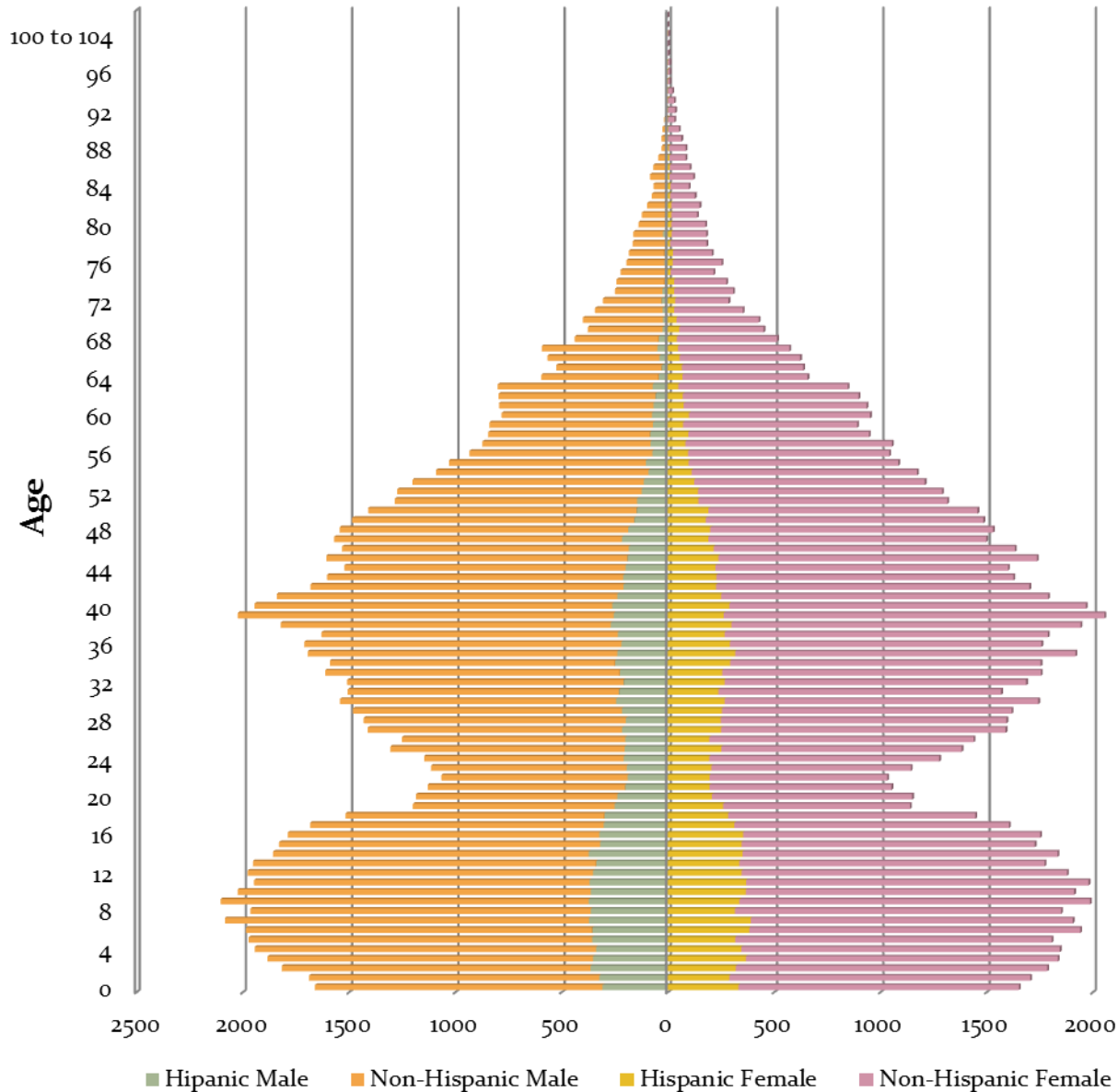
Male	Female
426,038	429,717
29.5%	29.7%

Total Population: 1,445,632

Population Share: 22.6%

Age	Population	Percent
Under 18	408,341	28.2%
Age 18 - 24	150,671	10.4%
Age 25 - 34	224,128	15.5%
Age 35 - 44	206,387	14.3%
Age 45 - 54	195,144	13.5%
Age 55 - 65	139,018	9.6%
Age 65 - 74	70,456	4.9%
Over 74	51,487	3.6%

Gilbert



Hispanic

Male

14,946

7.2%

Female

16,128

7.7%

Non-Hispanic

Male

87,688

42.1%

Female

89,691

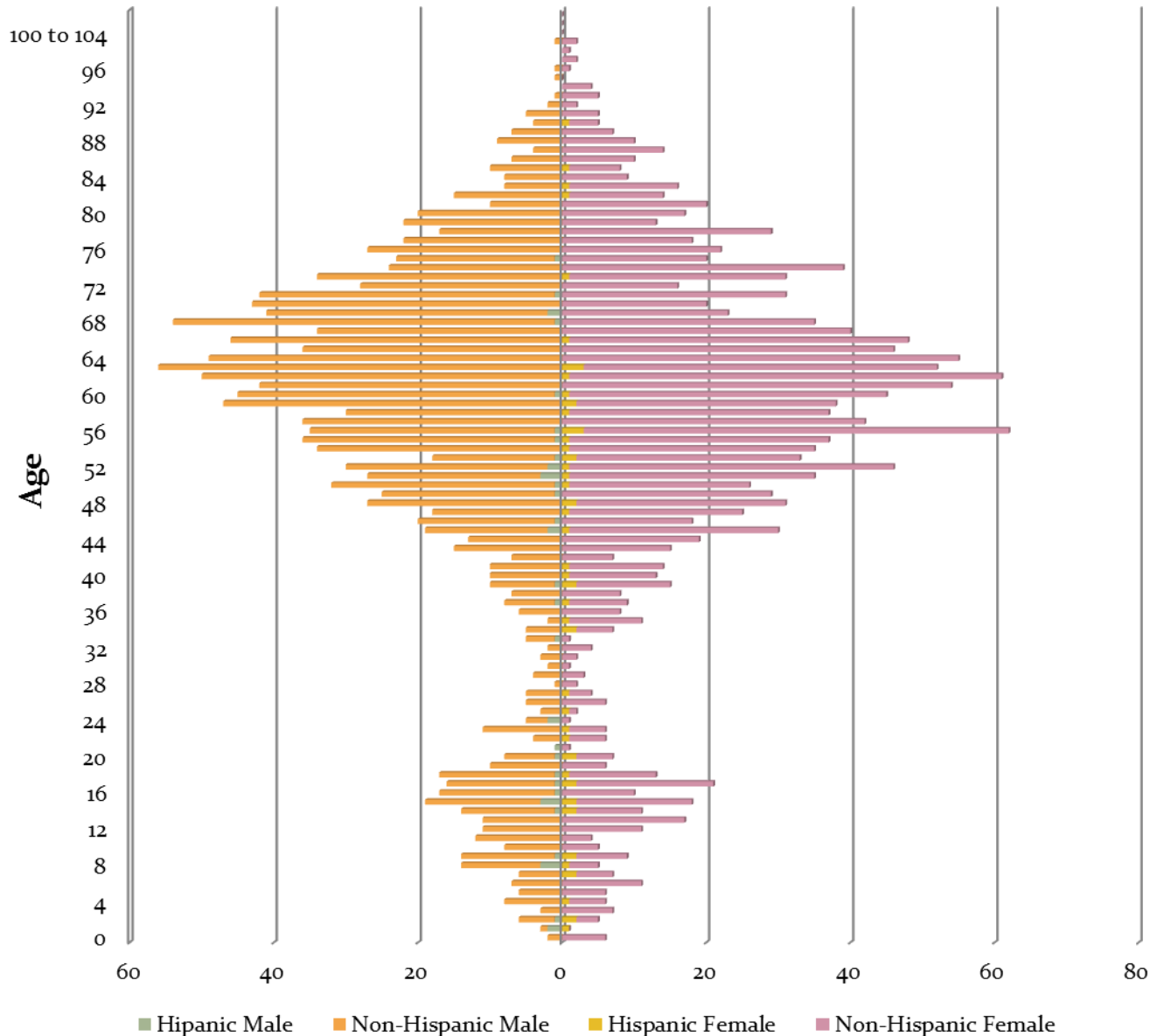
43.0%

Total Population: 208,453

Population Share: 3.3%

Age	Population	Percent
Under 18	66,930	32.1%
Age 18 - 24	16,596	8.0%
Age 25 - 34	30,765	14.8%
Age 35 - 44	35,615	17.1%
Age 45 - 54	28,327	13.6%
Age 55 - 65	17,592	8.4%
Age 65 - 74	8,477	4.1%
Over 74	4,151	2.0%

Carefree



Hispanic

Male

40

1.2%

Female

58

1.7%

Non-Hispanic

Male

1,598

47.5%

Female

1,667

49.6%

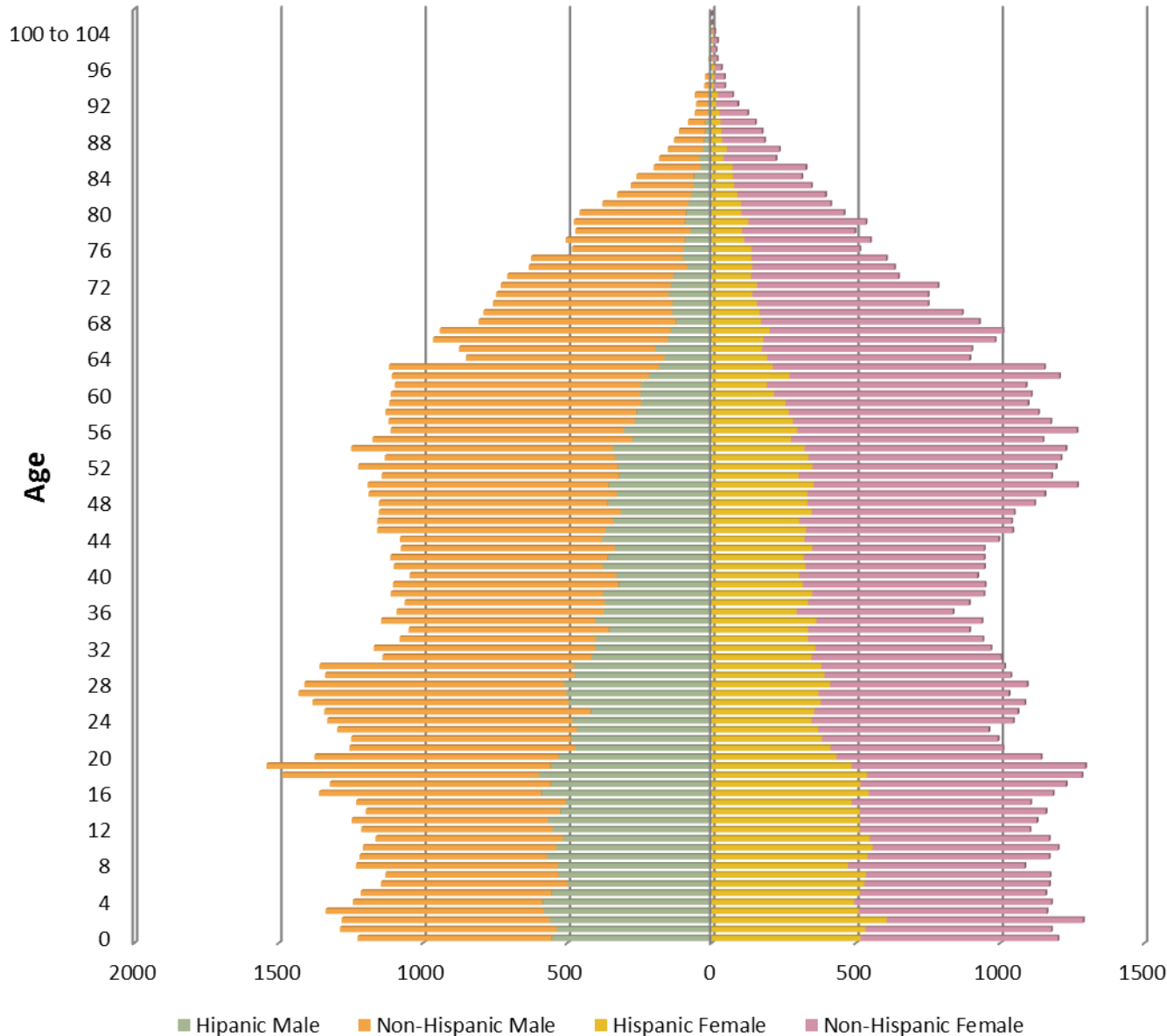
Total Population: 3,363

Population Share: .05%

Age Population Percent

Under 18	337	10.0%
Age 18 - 24	96	2.9%
Age 25 - 34	67	2.0%
Age 35 - 44	207	6.2%
Age 45 - 54	558	16.6%
Age 55 - 65	909	27.0%
Age 65 - 74	711	21.1%
Over 74	478	14.2%

Cochise/Graham/Greenlee



Hispanic	
Male	Female
29,624	28,279
16.7%	16.0%
Non-Hispanic	
Male	Female
61,728	57,372
34.9%	32.4%

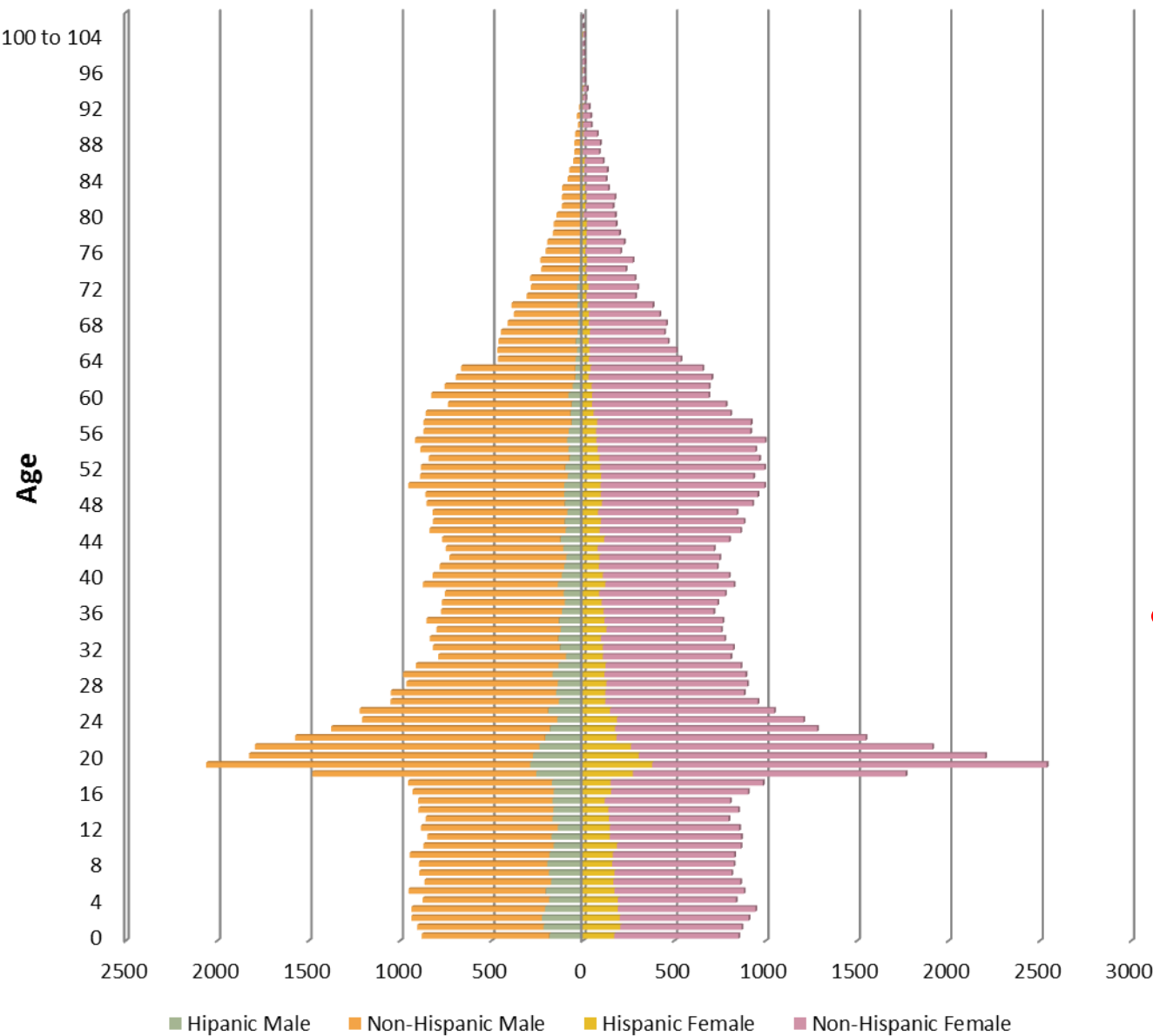
Total Population: 177,003

Population Share: 2.8%

Age	Population	Percent
Under 18	43,288	24.5%
Age 18 - 24	17,261	9.8%
Age 25 - 34	22,827	12.9%
Age 35 - 44	20,234	11.4%
Age 45 - 54	23,225	13.1%
Age 55 - 64	22,203	12.5%
Age 65 - 74	16,205	9.2%
Over 74	11,760	6.6%

Source: U.S. Census Bureau in conjunction with Arizona EPS

Coconino County



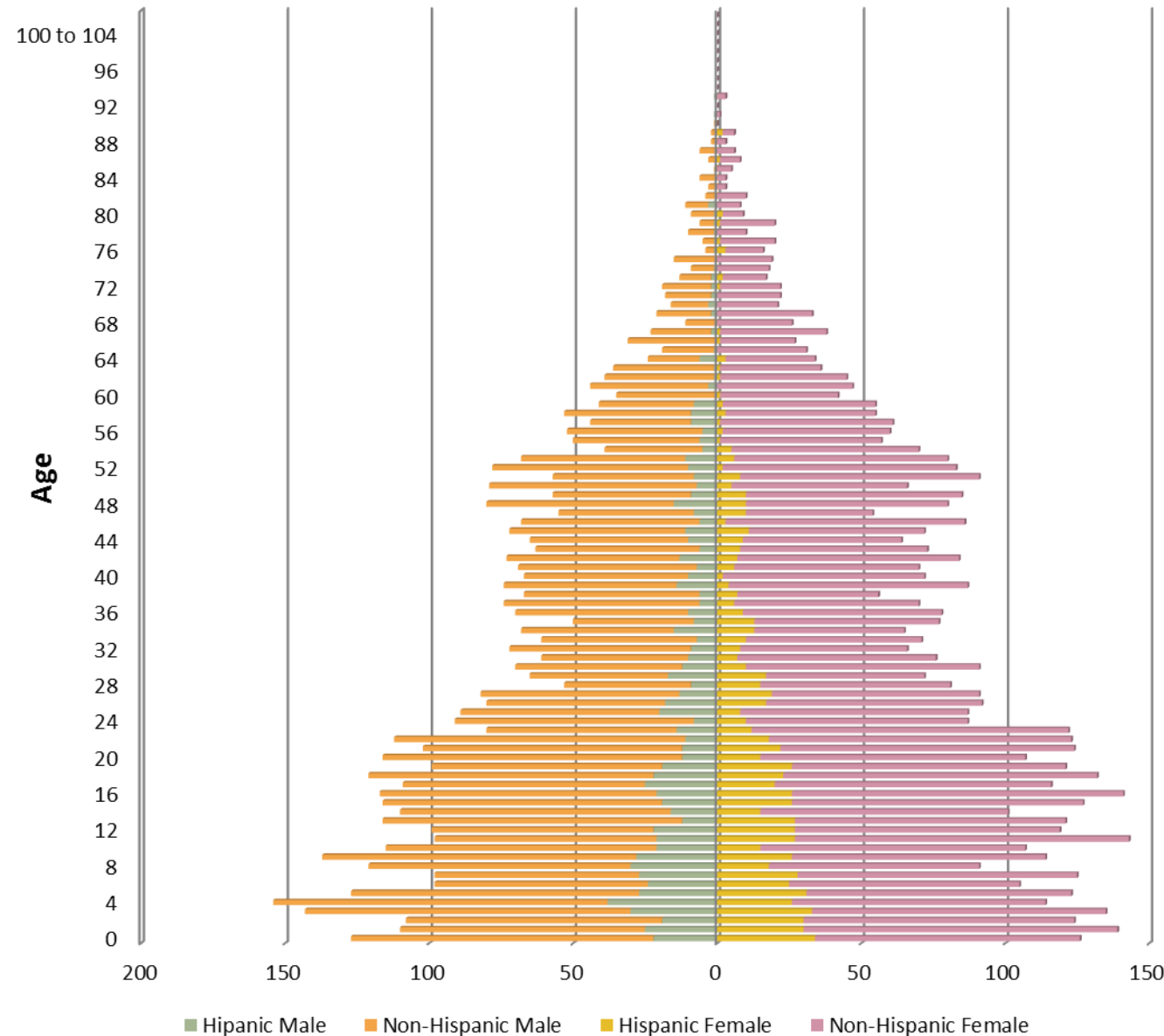
Hispanic	
Male	Female
9,157	9,009
6.8%	6.7%
Non-Hispanic	
Male	Female
57,509	58,746
42.8%	43.7%

Total Population: 134,421

Population Share: 2.1%

Age	Population	Percent
Under 18	31,788	23.6%
Age 18 - 24	23,768	17.7%
Age 25 - 34	18,129	13.5%
Age 35 - 44	15,499	11.5%
Age 45 -54	17,953	13.4%
Age 55 - 64	15,360	11.4%
Age 65 -74	7,447	5.5%
Over 74	4,477	3.3%

Gila River Reservation



Hispanic

Male

908

7.8%

Female

885

7.6%

Non-Hispanic

Male

4,630

39.5%

Female

5,289

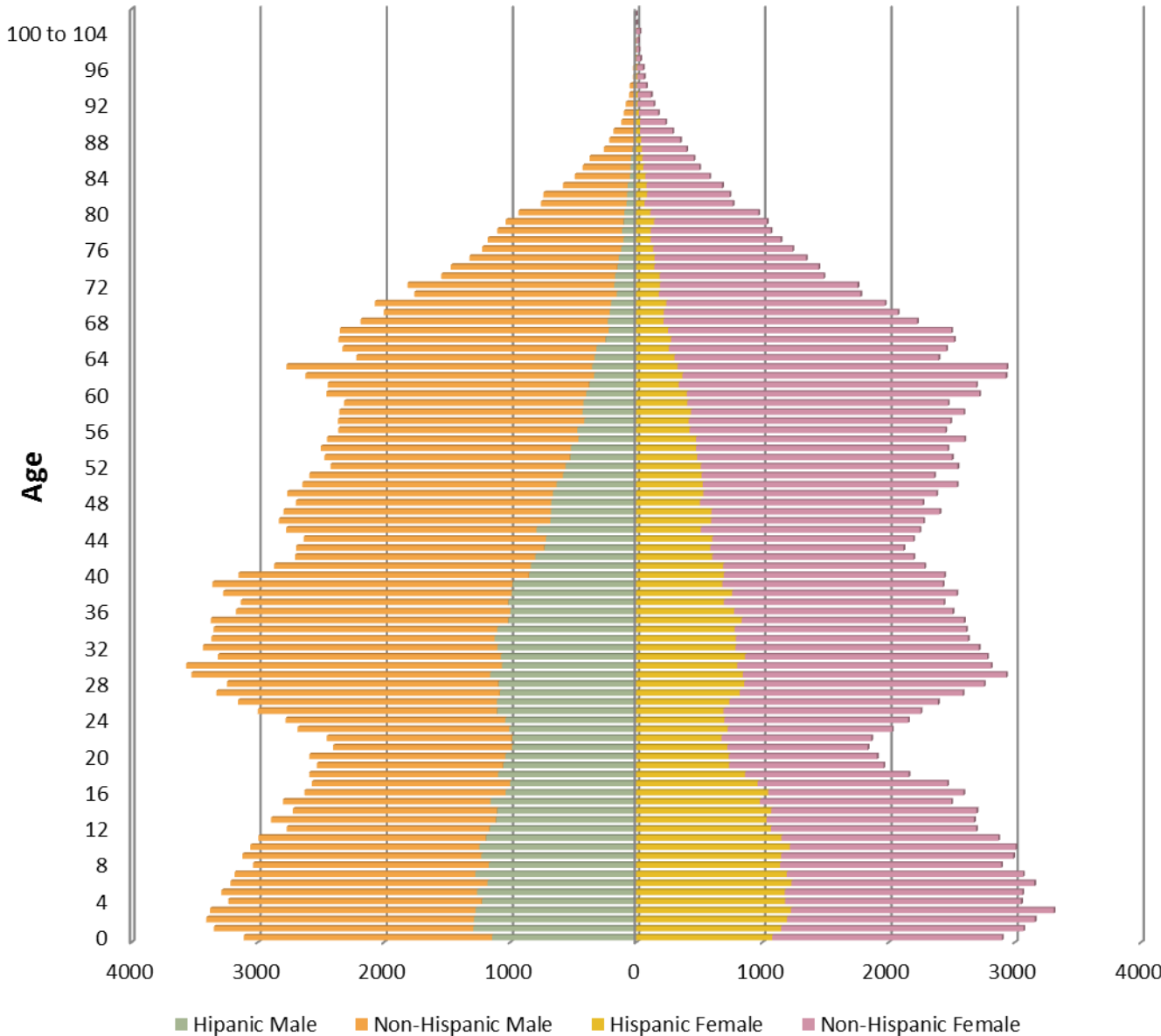
45.2%

Total Population: 11,712

Population Share: 0.2%

Age	Population	Percent
Under 18	4,274	36.5%
Age 18 - 24	1,537	13.1%
Age 25 - 34	1,493	12.7%
Age 35 - 44	1,403	12.0%
Age 45 -54	1,420	12.1%
Age 55 - 64	910	7.8%
Age 65 -74	435	3.7%
Over 74	240	2.0%

Gila/Pinal

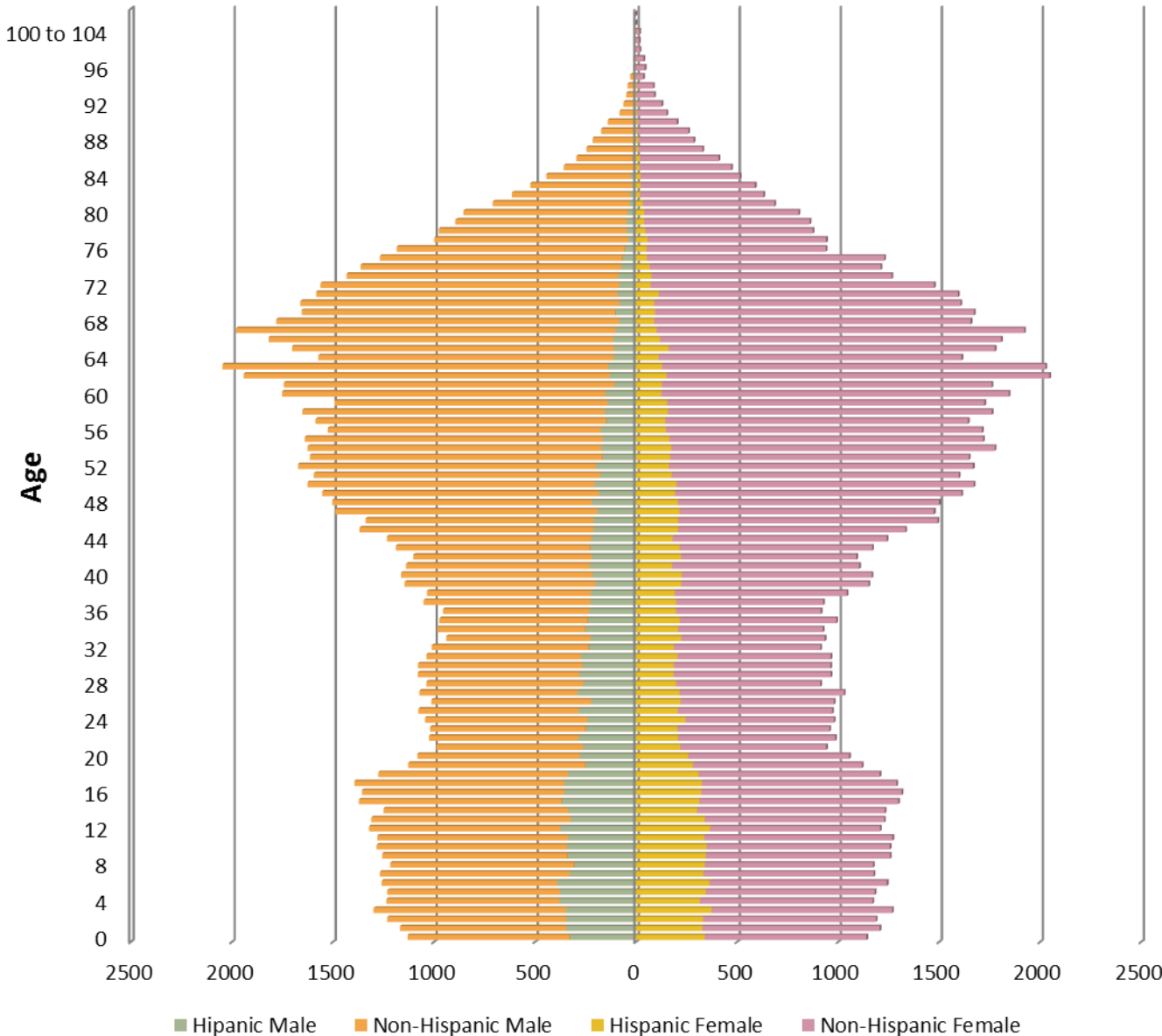


Hispanic	
Male	Female
61,958	53,284
14.7%	12.7%
Non-Hispanic	
Male	Female
157,677	147,730
37.5%	35.1%

Total Population: 420,649
Population Share: 6.6%

Age	Population	Percent
Under 18	108,053	25.7%
Age 18 - 24	32,315	7.7%
Age 25 - 34	60,130	14.3%
Age 35 - 44	54,464	12.9%
Age 45 - 54	50,844	12.1%
Age 55 - 65	50,849	12.1%
Age 65 - 74	40,178	9.6%
Over 74	23,816	5.7%

La Paz/Mohave



Hispanic

Male	Female
17,582	16,793
8.0%	7.6%

Non-Hispanic

Male	Female
93,046	93,254
42.2%	42.3%

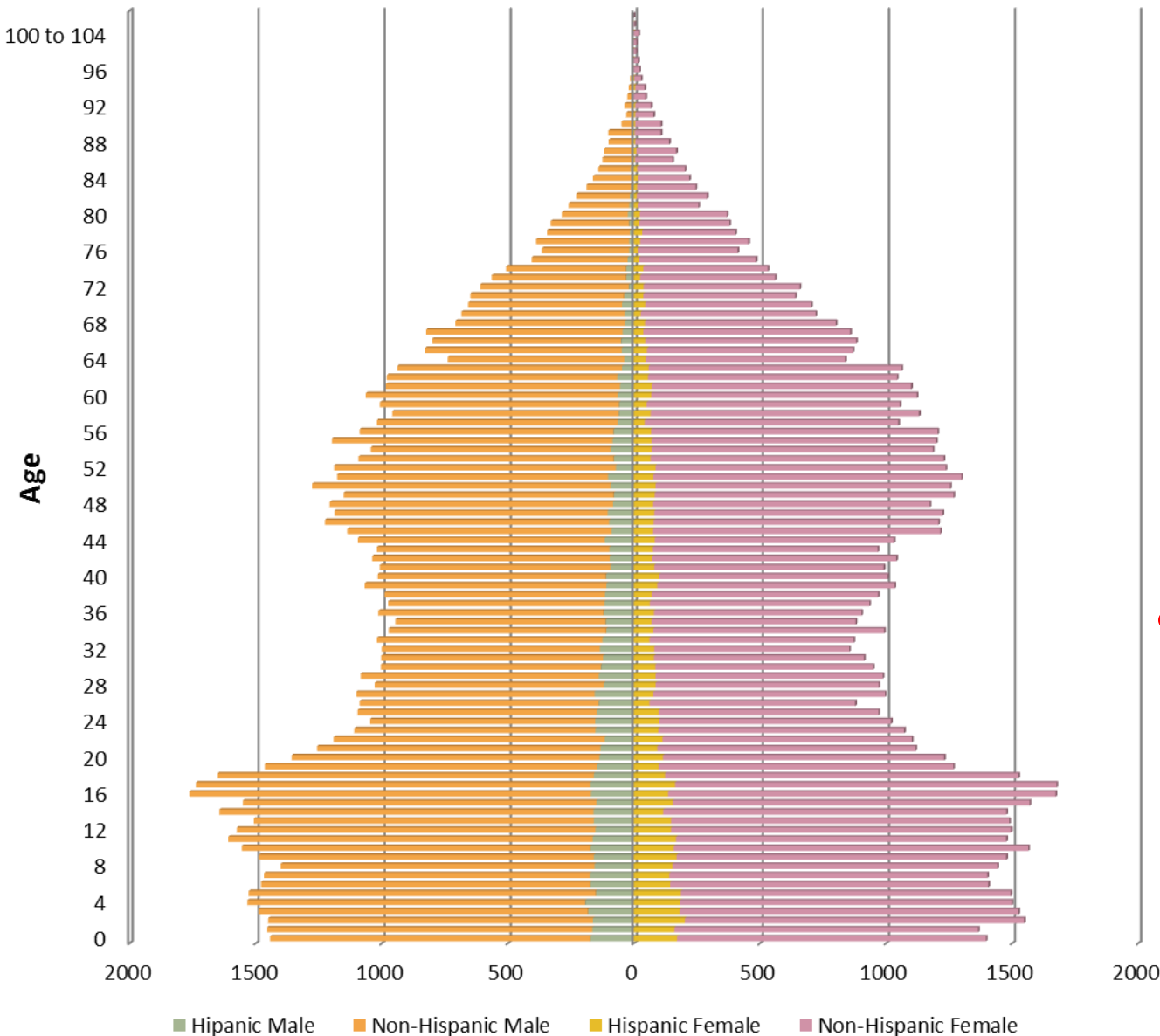
Total Population: 220,675

Population Share: 3.5%

Age Population Percent

Under 18	44,943	20.4%
Age 18 - 24	14,799	6.7%
Age 25 - 34	19,875	9.0%
Age 35 - 44	21,778	9.9%
Age 45 -54	31,146	14.1%
Age 55 - 64	34,793	15.8%
Age 65 -74	32,514	14.7%
Over 74	20,827	9.4%

Navajo/Apache



Hispanic

Male	Female
8,424	7,260
4.7%	4.1%

Non-Hispanic

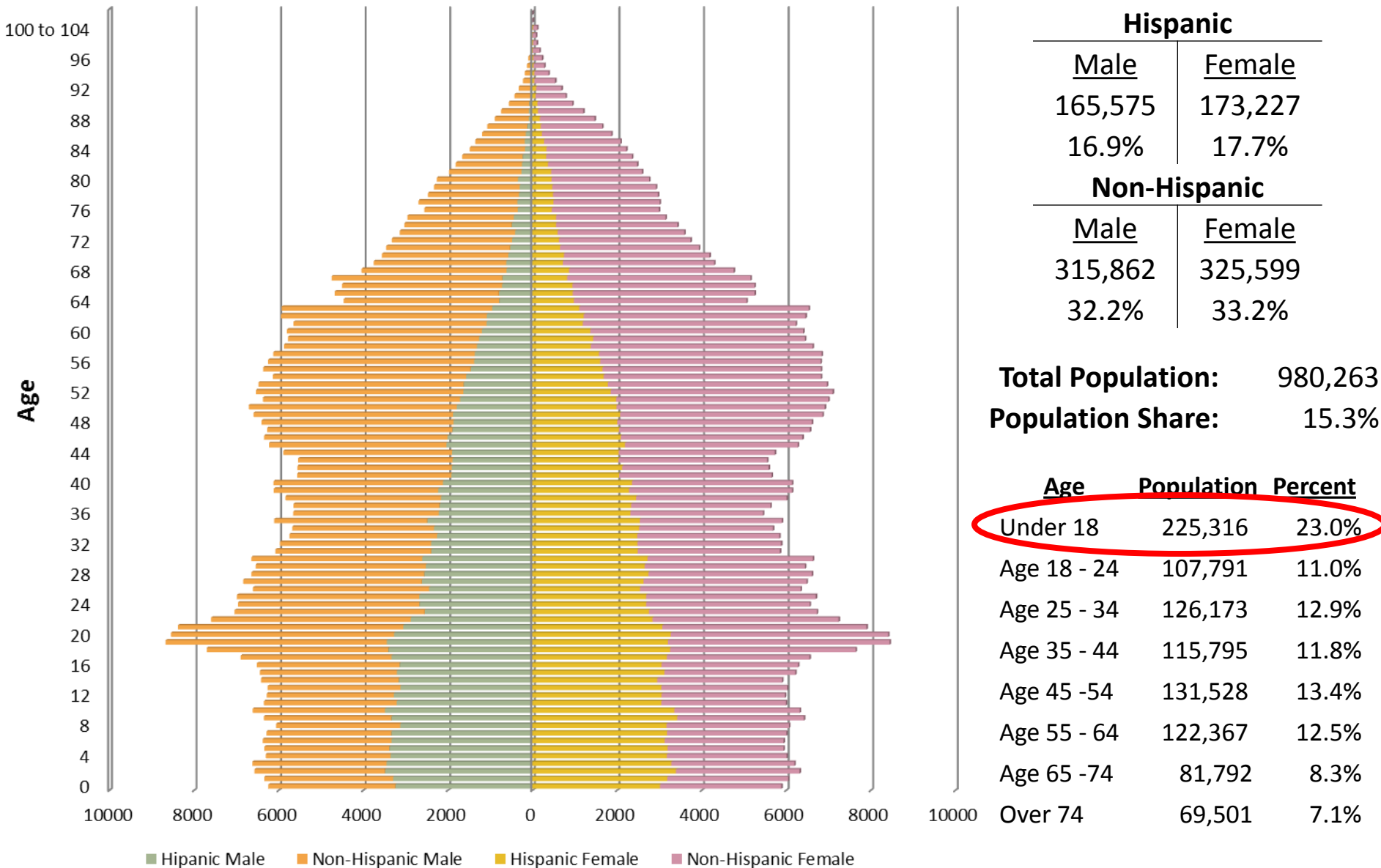
Male	Female
81,031	82,252
45.3%	46.0%

Total Population: 178,967

Population Share: 2.8%

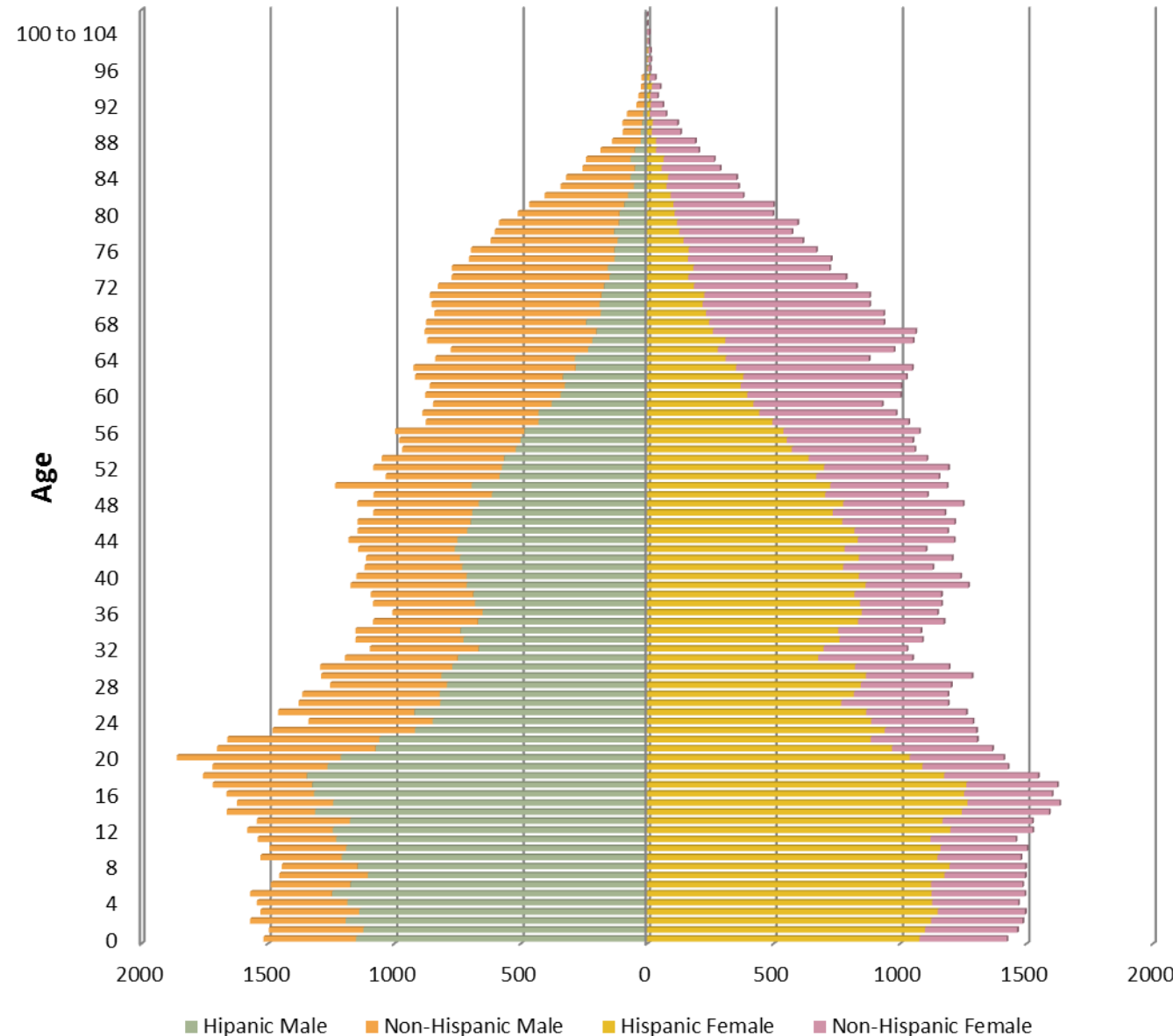
Age	Population	Percent
Under 18	54,633	30.5%
Age 18 - 24	17,401	9.7%
Age 25 - 34	19,768	11.0%
Age 35 - 44	19,913	11.1%
Age 45 - 54	23,973	13.4%
Age 55 - 64	20,770	11.6%
Age 65 - 74	14,043	7.8%
Over 74	8,466	4.7%

Pima County



Source: U.S. Census Bureau in conjunction with Arizona EPS

Southern Arizona



Hispanic

Male

271,227

19.4%

Female

281,663

20.1%

Non-Hispanic

Male

422,126

30.1%

Female

425,421

30.4%

Total Population: 1,400,437

Population Share: 21.9%

Age Population Percent

Under 18 338,349 24.2%

Age 18 - 24 150,219 10.7%

Age 25 - 34 177,996 12.7%

Age 35 - 44 164,733 11.8%

Age 45 - 54 183,794 13.1%

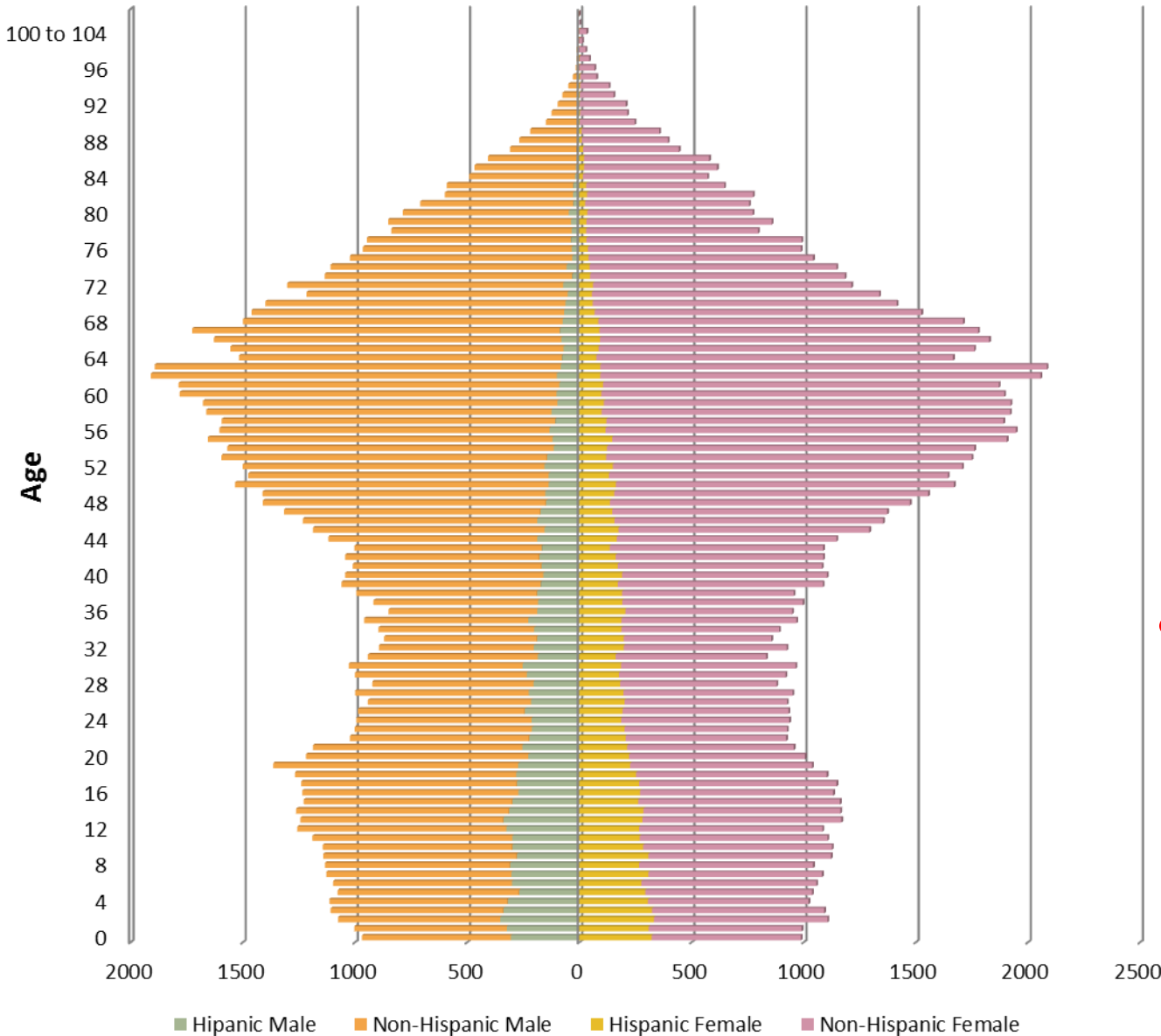
Age 55 - 64 169,218 12.1%

Age 65 - 74 119,065 8.5%

Over 74 97,063 6.9%

Source: U.S. Census Bureau in conjunction with Arizona EPS

Yavapai County



Hispanic

<u>Male</u>	<u>Female</u>
14,638	14,090
6.9%	6.7%

Non-Hispanic

<u>Male</u>	<u>Female</u>
88,820	93,485
42.1%	44.3%

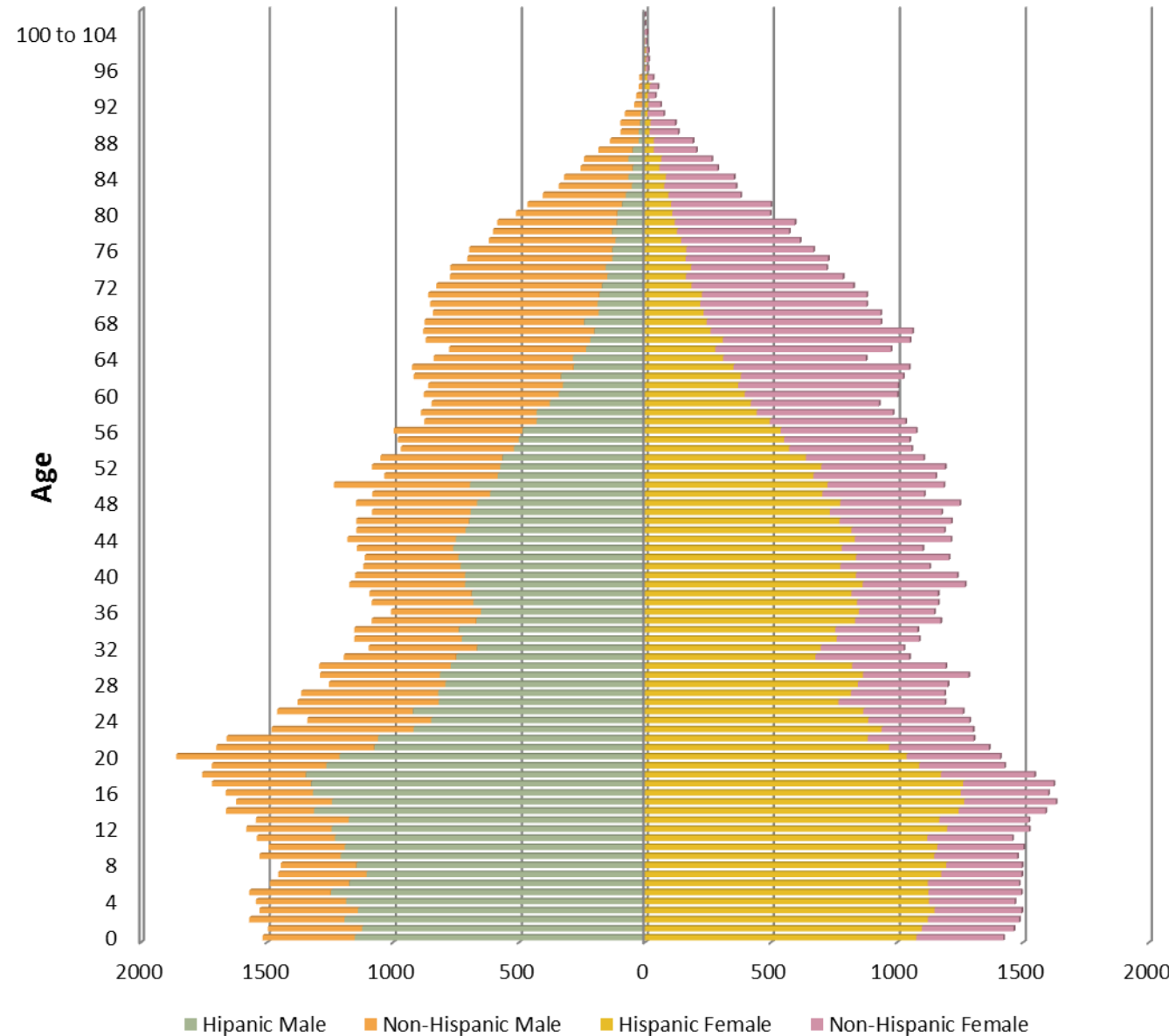
Total Population: 211,033

Population Share: 3.3%

Age Population Percent

<u>Age</u>	<u>Population</u>	<u>Percent</u>
Under 18	40,269	19.1%
Age 18 - 24	14,940	7.1%
Age 25 - 34	18,552	8.8%
Age 35 - 44	20,458	9.7%
Age 45 -54	29,810	14.1%
Age 55 - 64	36,237	17.2%
Age 65 -74	28,925	13.7%
Over 74	21,842	10.4%

Yuma County



Hispanic

Male	Female
57,589	59,323
29.4%	30.3%

Non-Hispanic

Male	Female
40,416	38,423
20.6%	19.6%

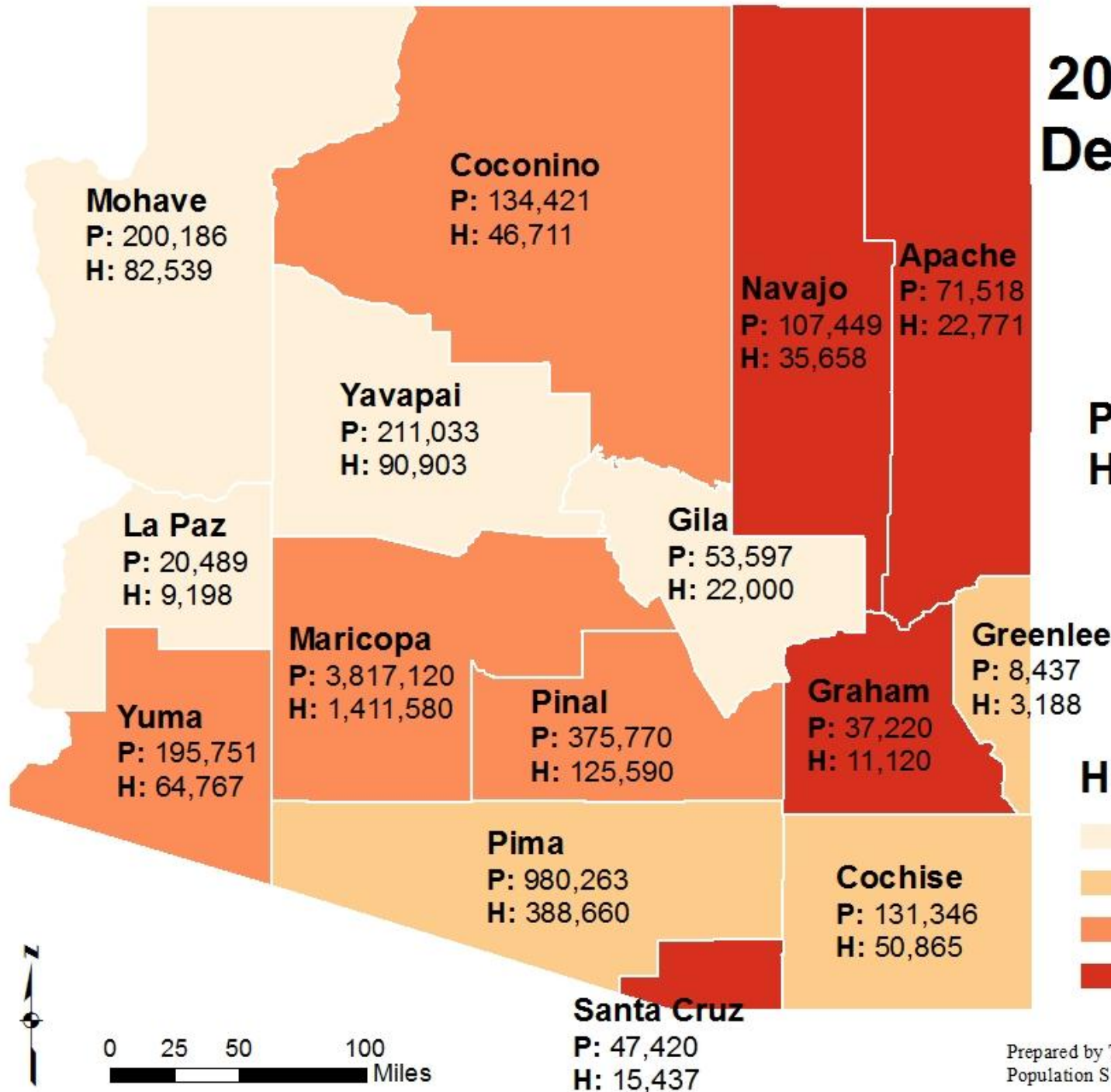
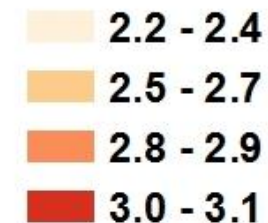
Total Population: 195,751
Population Share: 3.1%

Age	Population	Percent
Under 18	55,185	28.2%
Age 18 - 24	21,155	10.8%
Age 25 - 34	24,195	12.4%
Age 35 - 44	22,944	11.7%
Age 45 - 54	22,598	11.5%
Age 55 - 64	19,028	9.7%
Age 65 - 74	17,377	8.9%
Over 74	13,269	6.8%

2010 Census Demographic Profile

Total
P: Population
H: Households

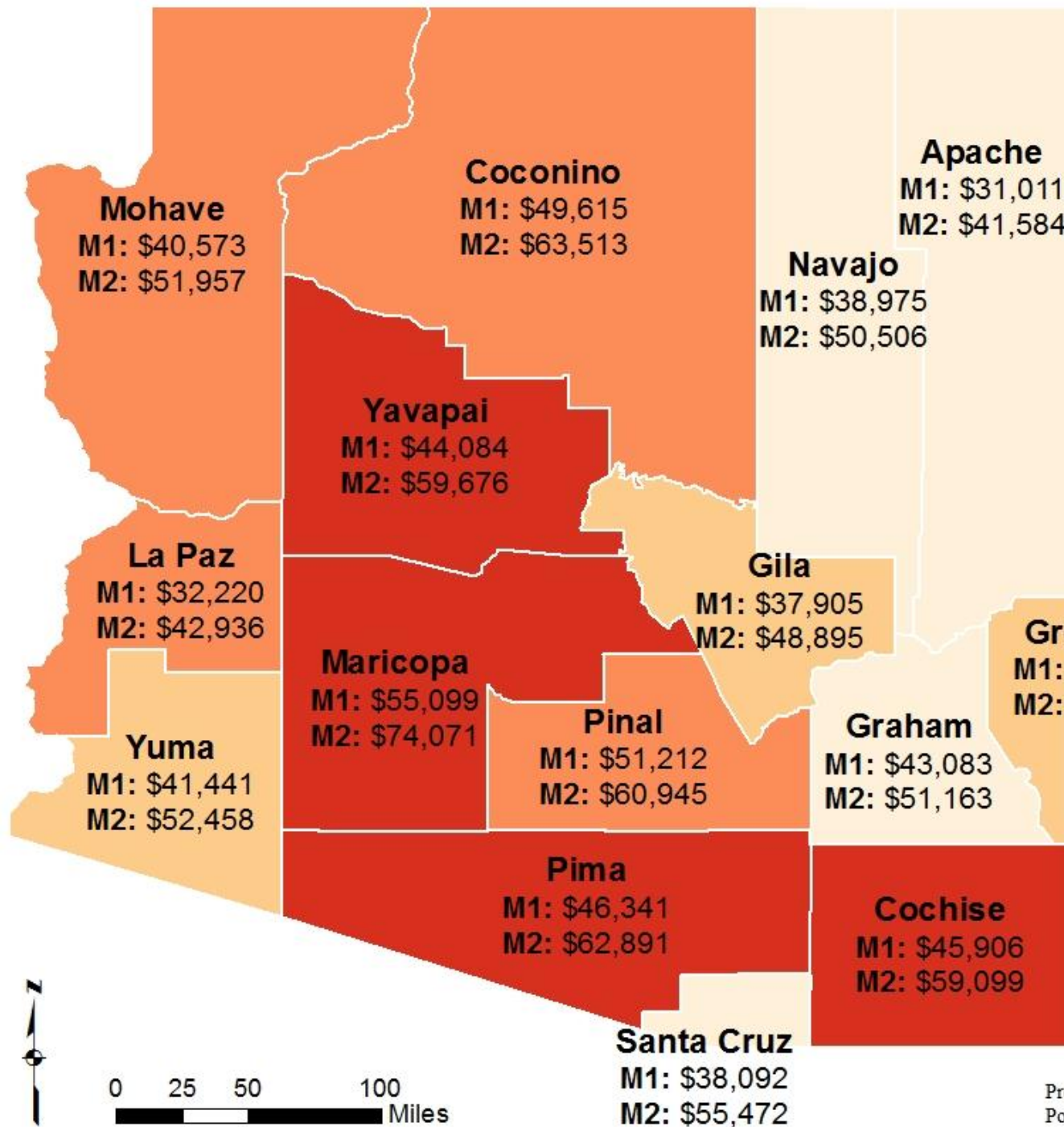
**Average
Household Size**



American Community Survey (ACS) Estimates, 2007-2011

Household Income
M1: Median
M2: Mean

Per Capita Income

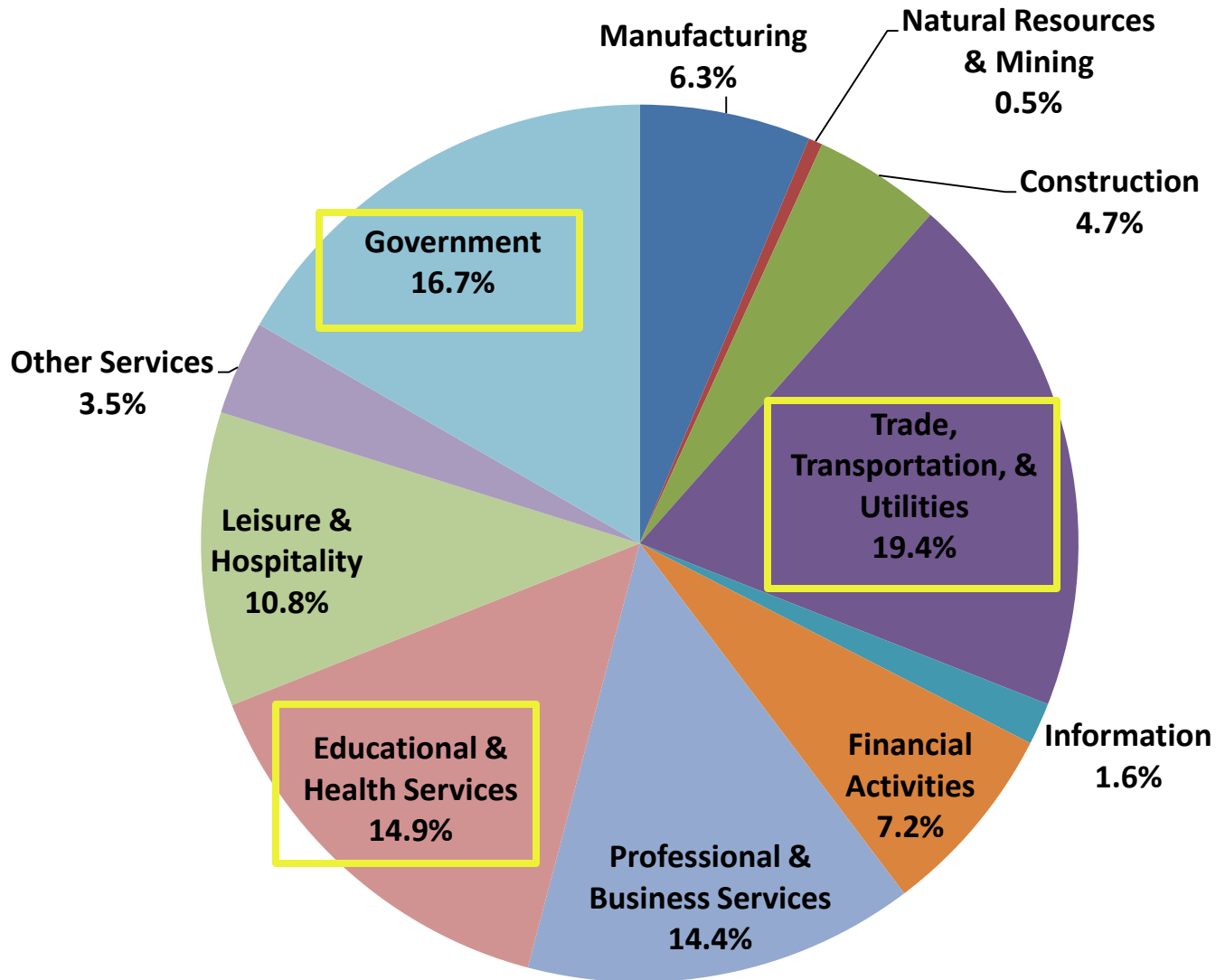


0 25 50 100 Miles

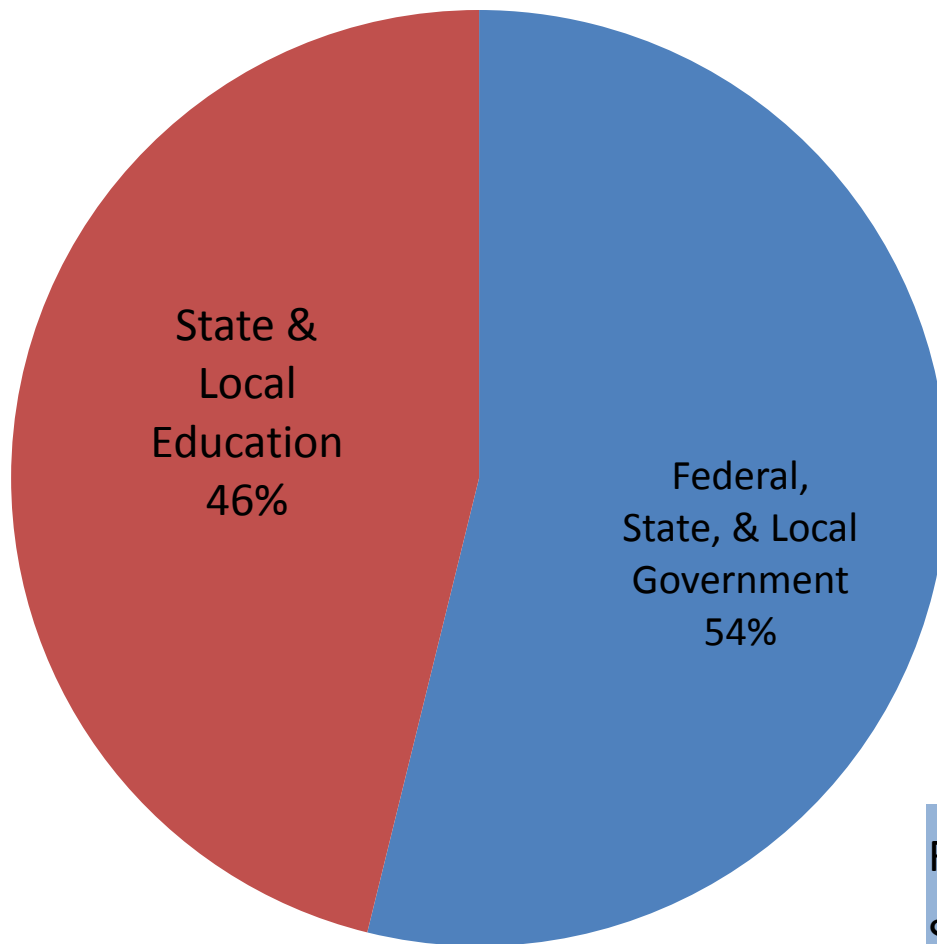
A light blue map of Washington state is centered in the background. The map shows the state's outline, including the jagged coastline on the west and the panhandle on the north. A dark blue horizontal bar is superimposed over the center of the map.

Industry Overview

Share of Arizona Total Nonfarm Employment by Industry 2012 Annual Average

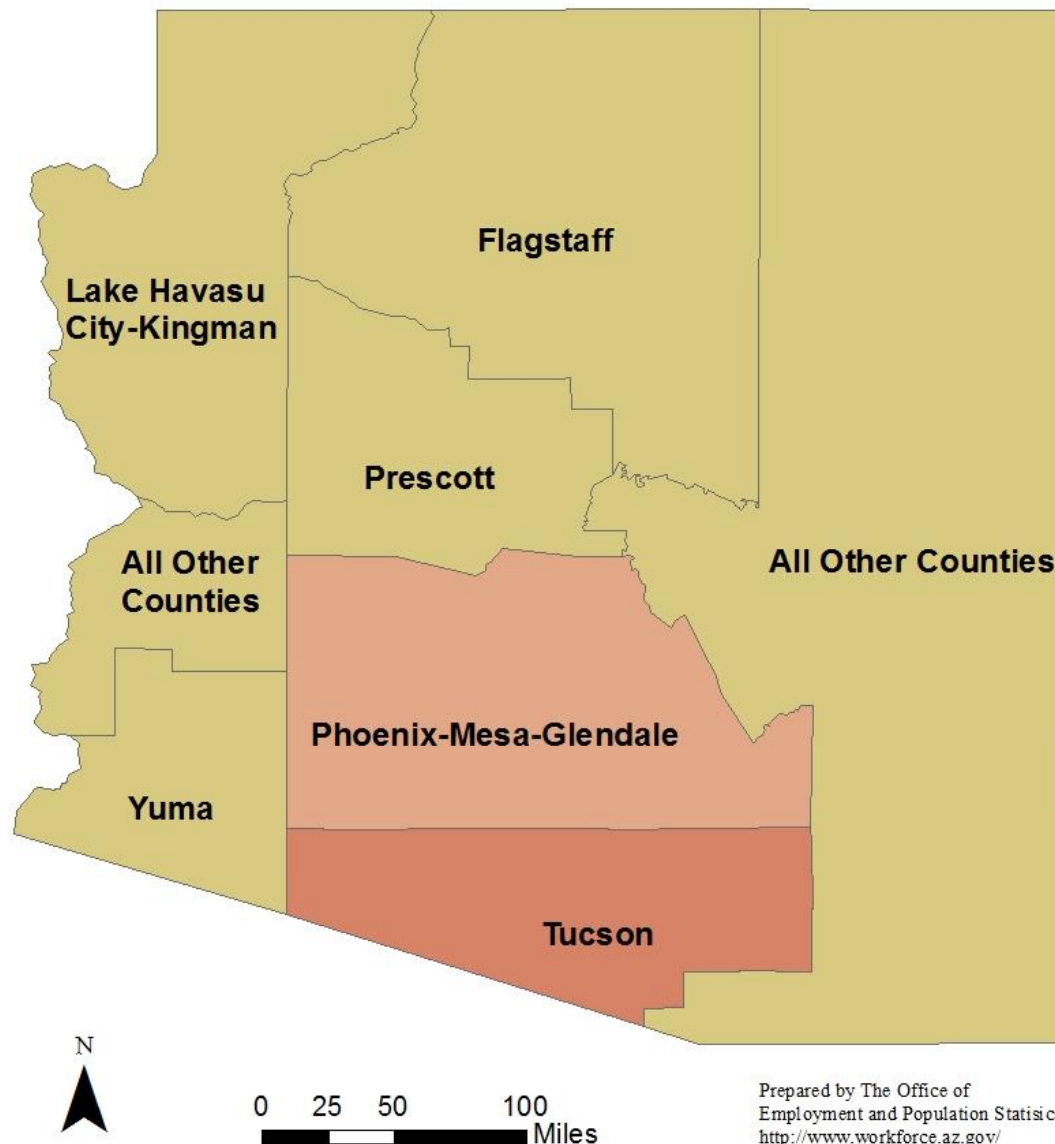


Subsector Share of Arizona Government Employment 2012 Annual Average



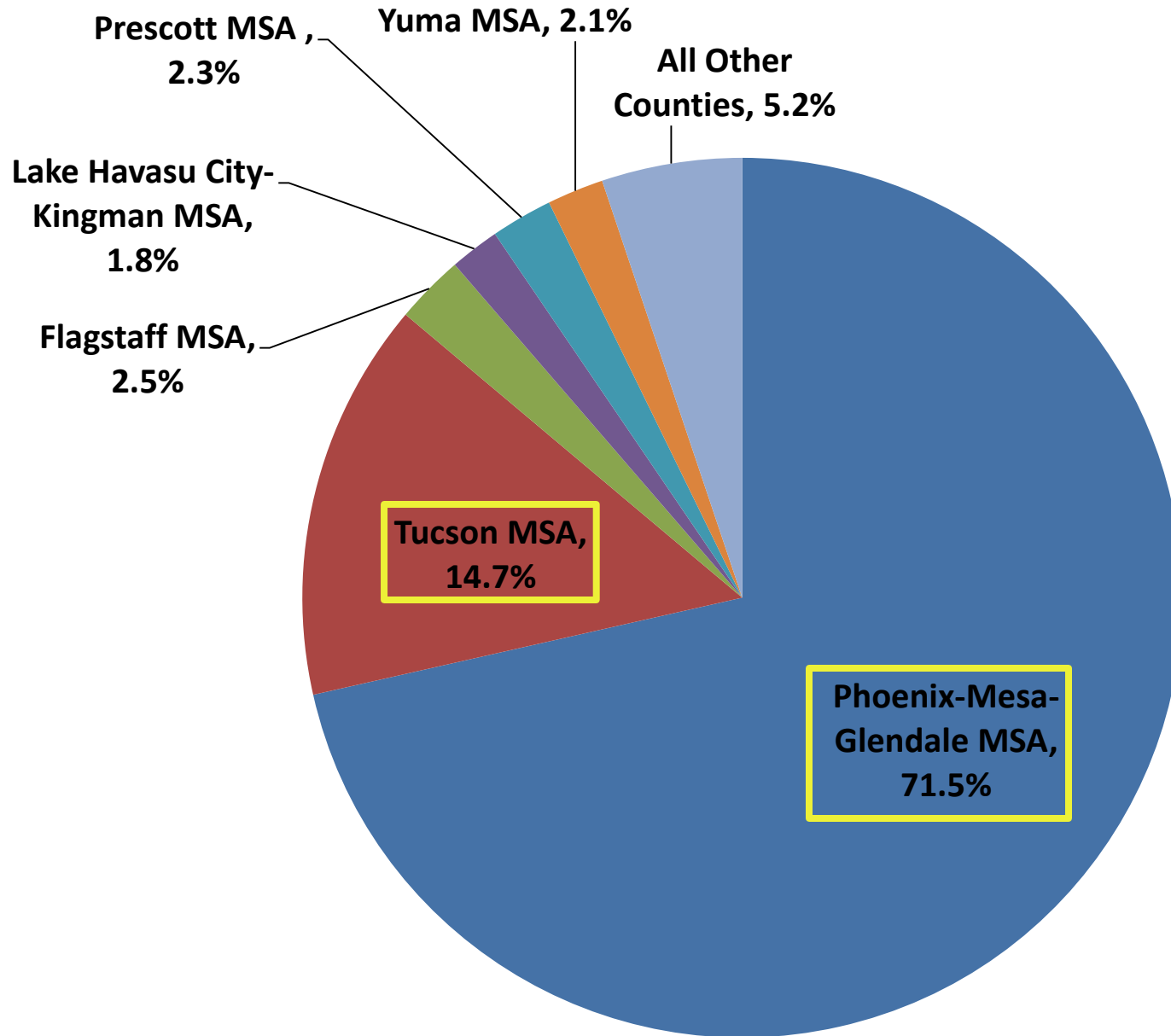
Government Subsectors	Employment Level
Federal Government	56.3
State Government	84.0
State Government Education	46.1
Local Government	270.4
Local Government Education	143.5

Arizona Metropolitan Statistical Areas

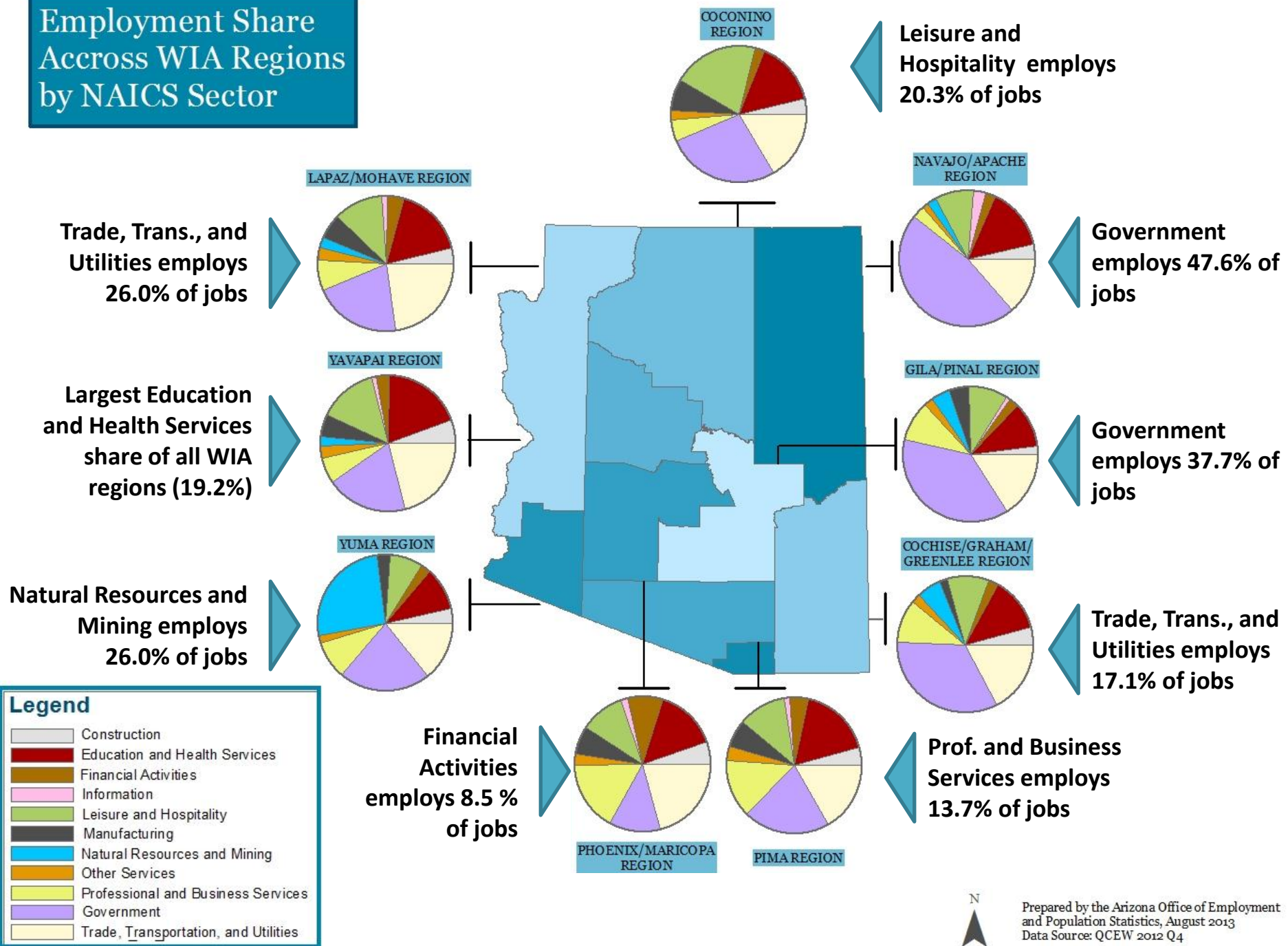


Share of AZ Nonfarm Employment by MSA

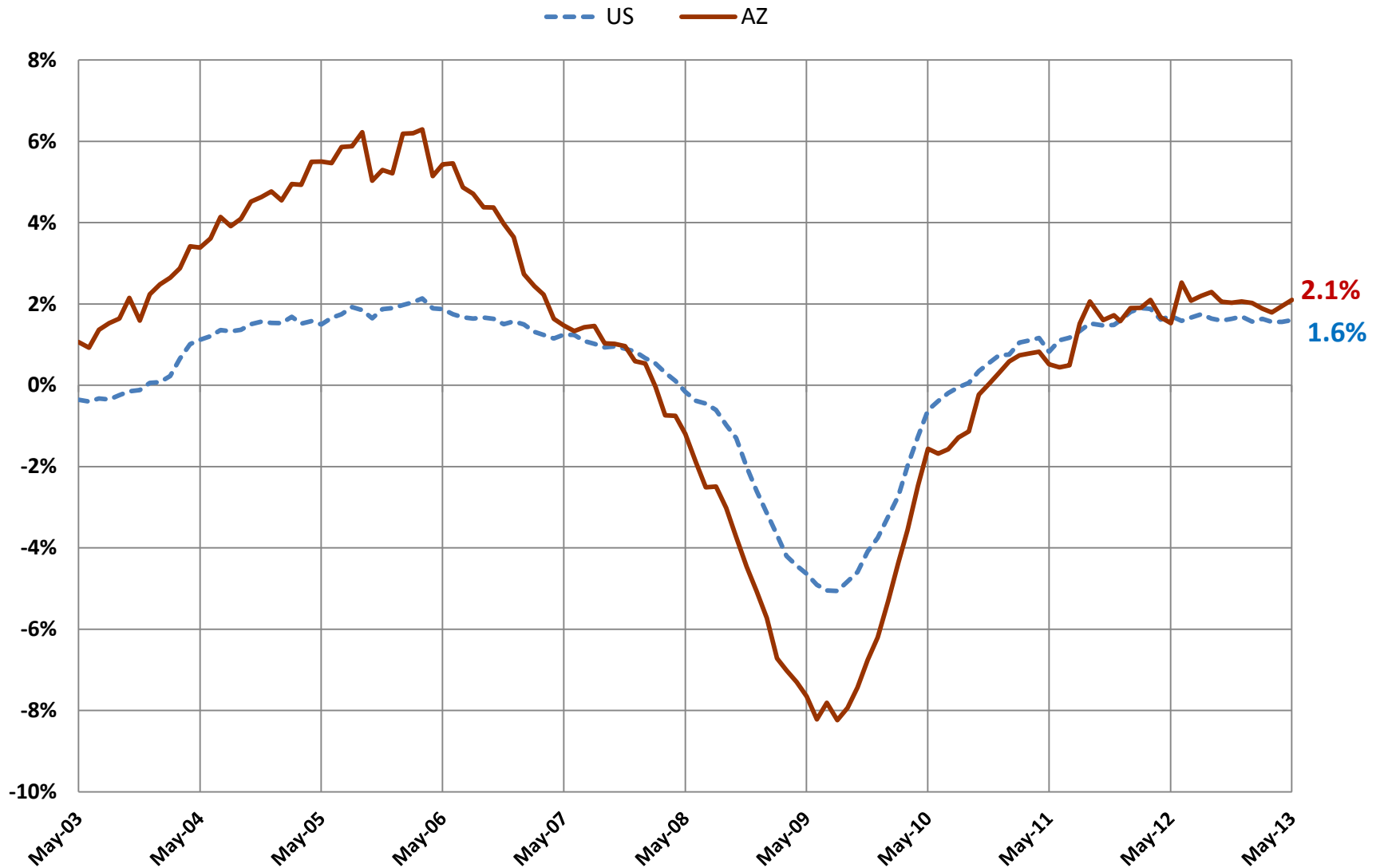
2012 Average



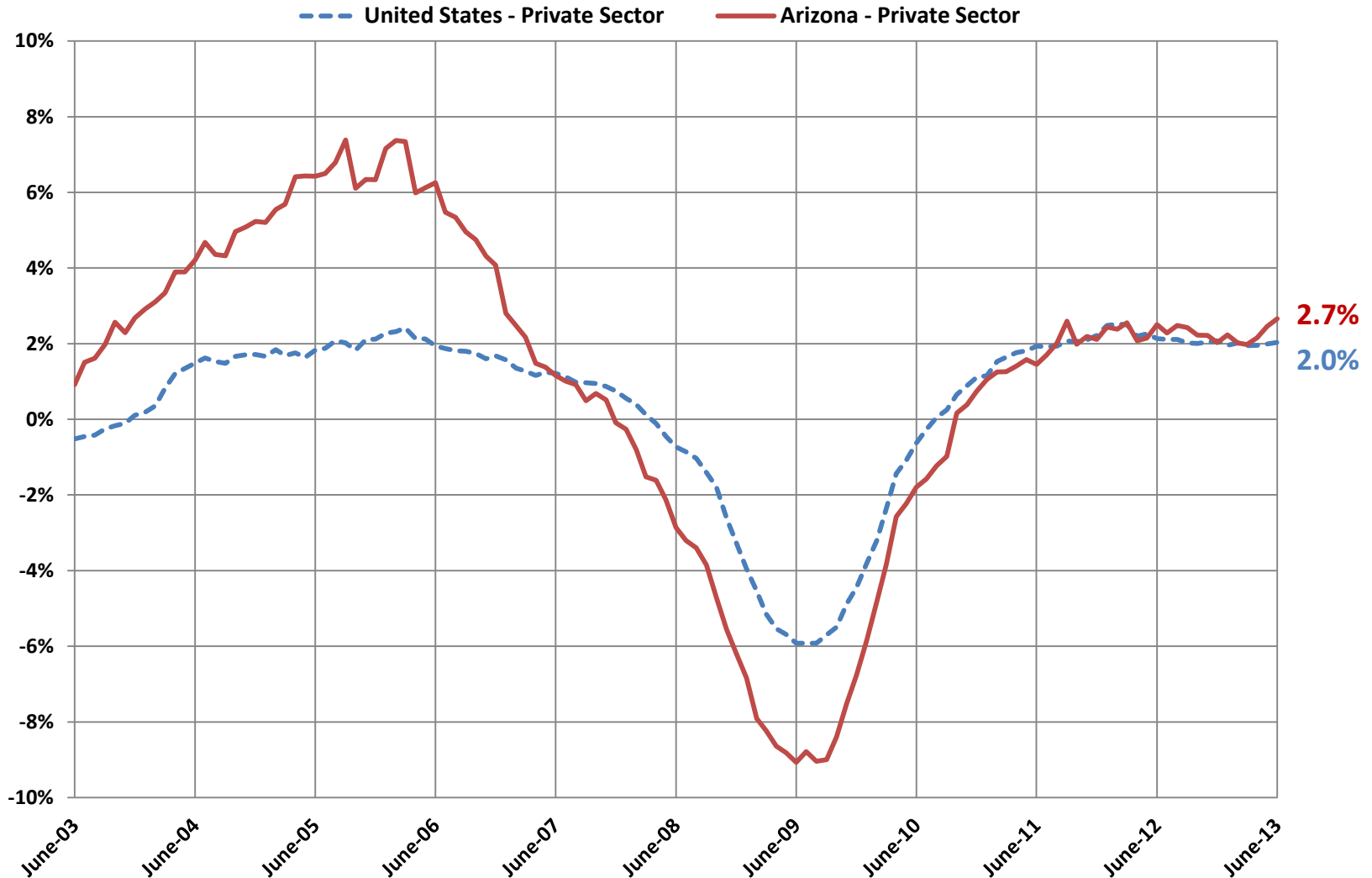
Employment Share Accross WIA Regions by NAICS Sector



Arizona & U.S. Nonfarm Employment Year-to-Year Percent Change



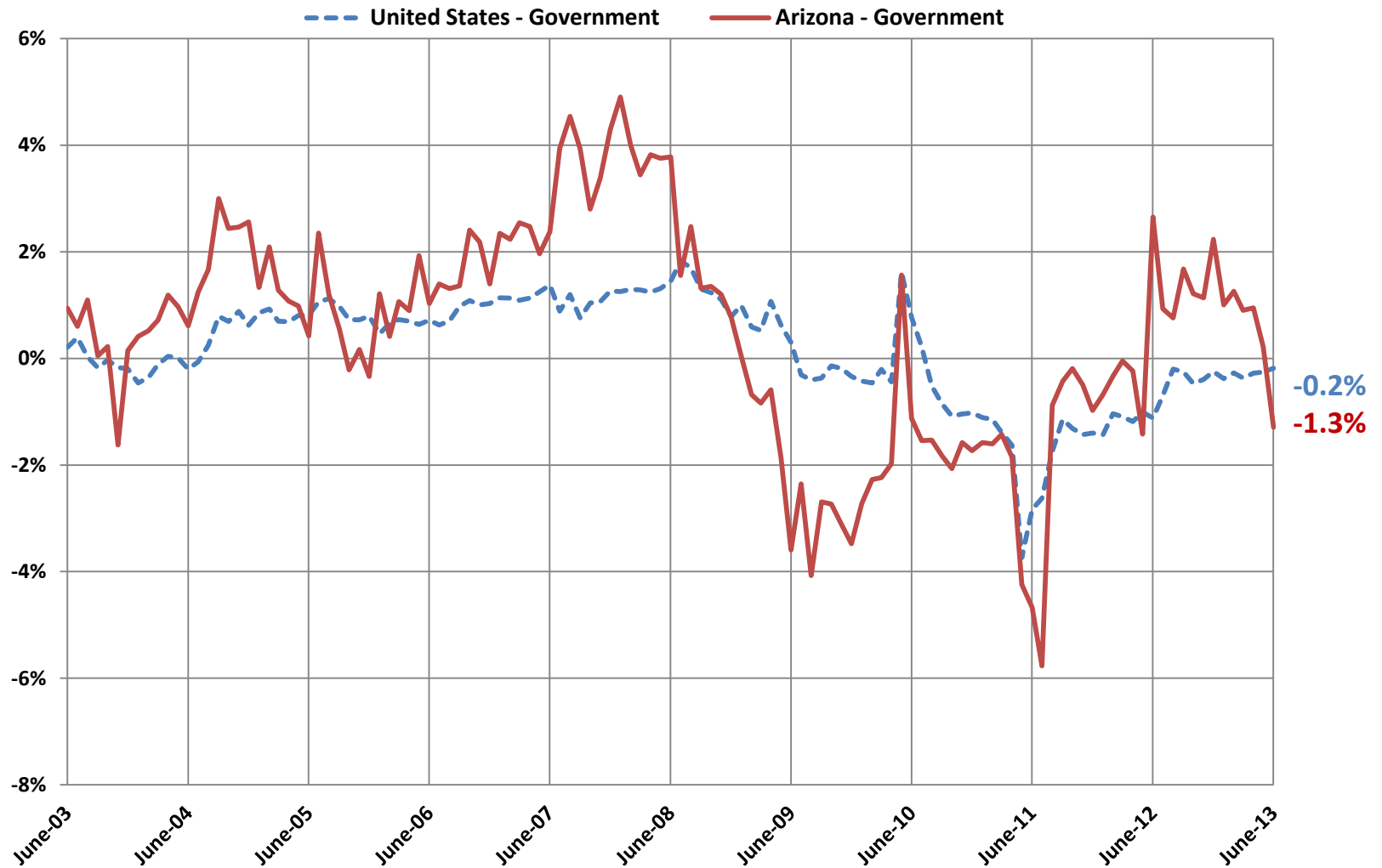
Arizona & U.S. Private Sector Employment Year-to-Year Percent Change

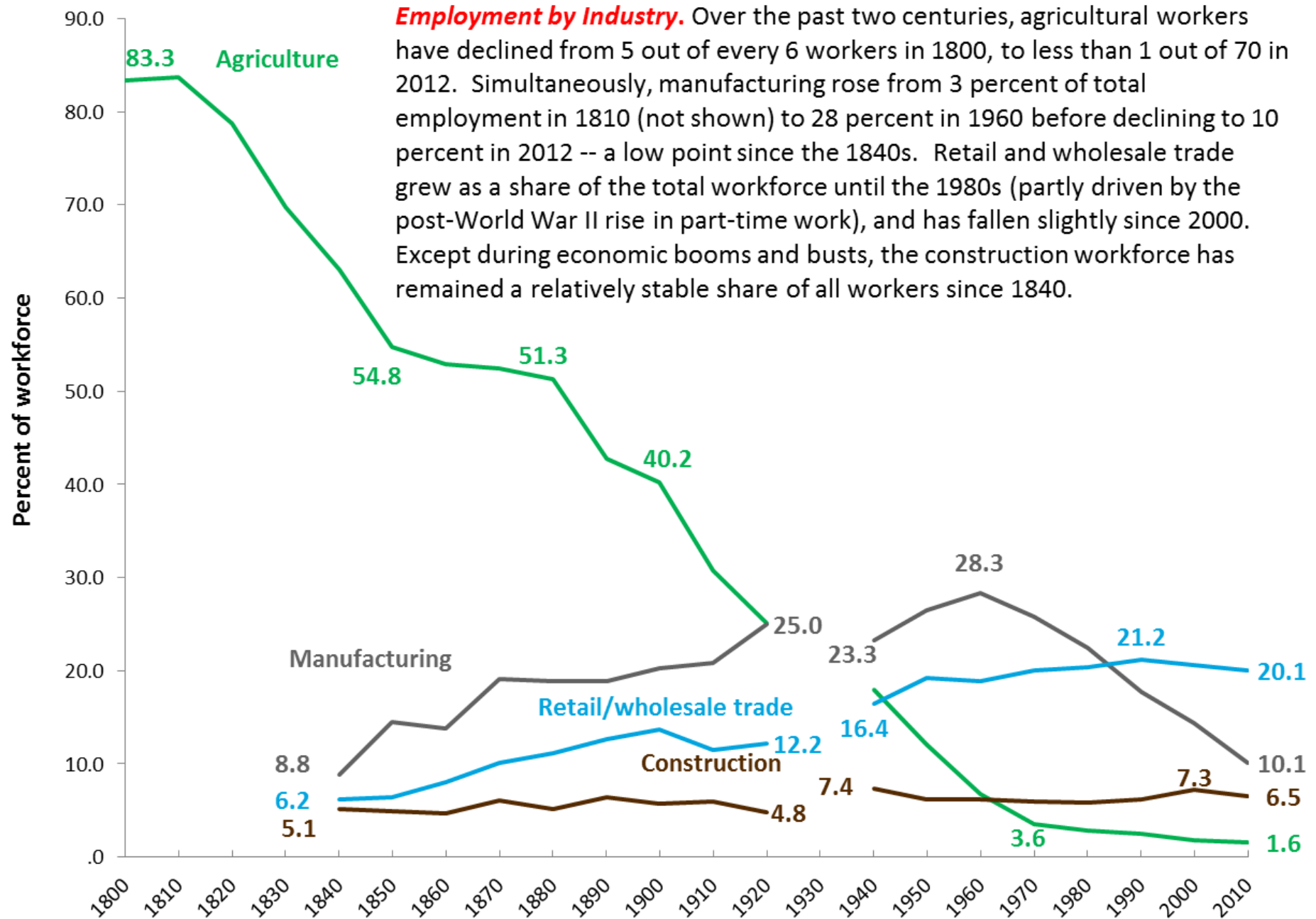


22 consecutive months of Private Sector gains at 2% or above

Arizona & U.S. Government Employment

Year-to-Year Percent Change

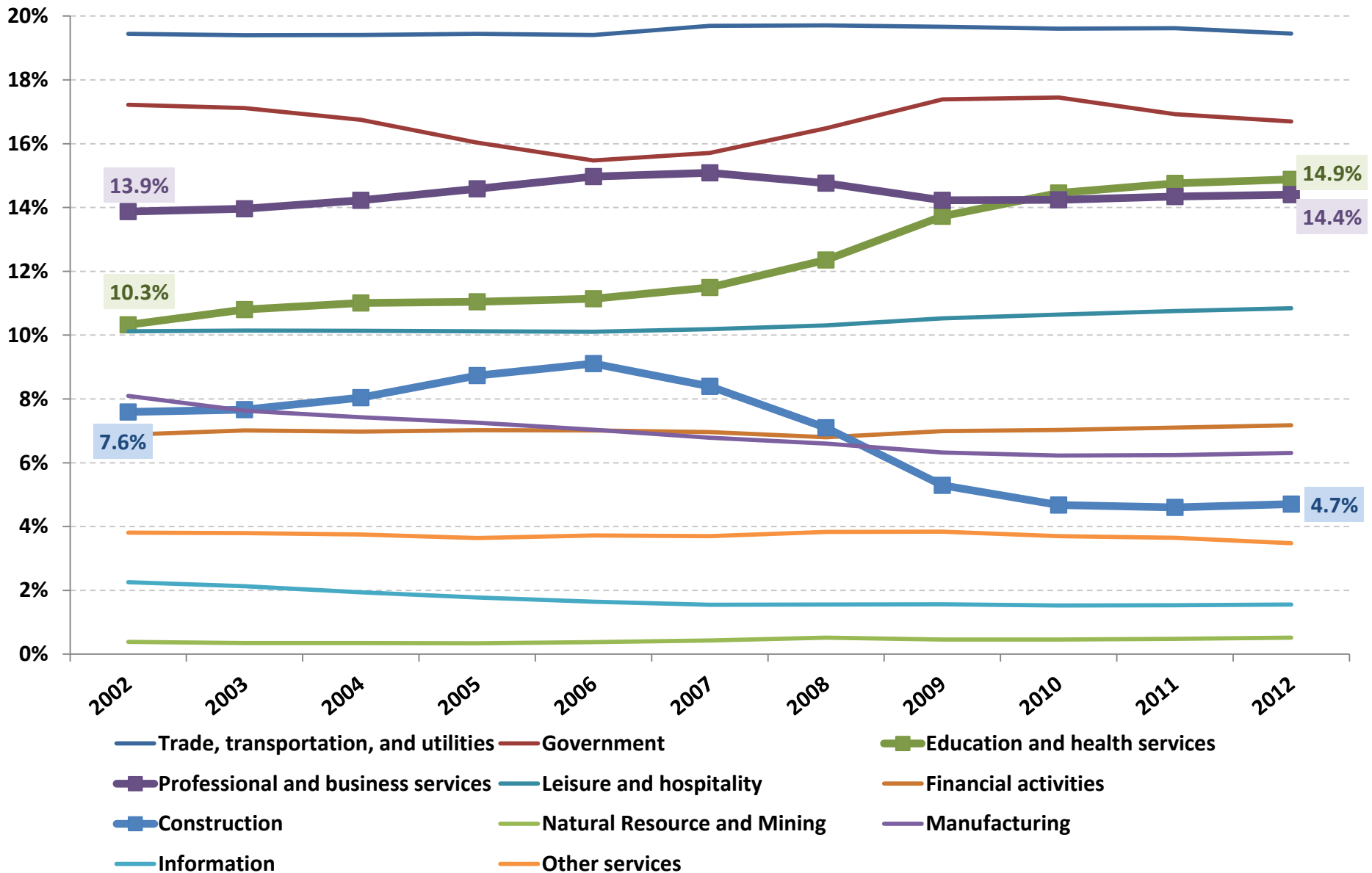




Source: Workforce One, <https://winwin.workforce3one.org/view/2001316160056824437/info>

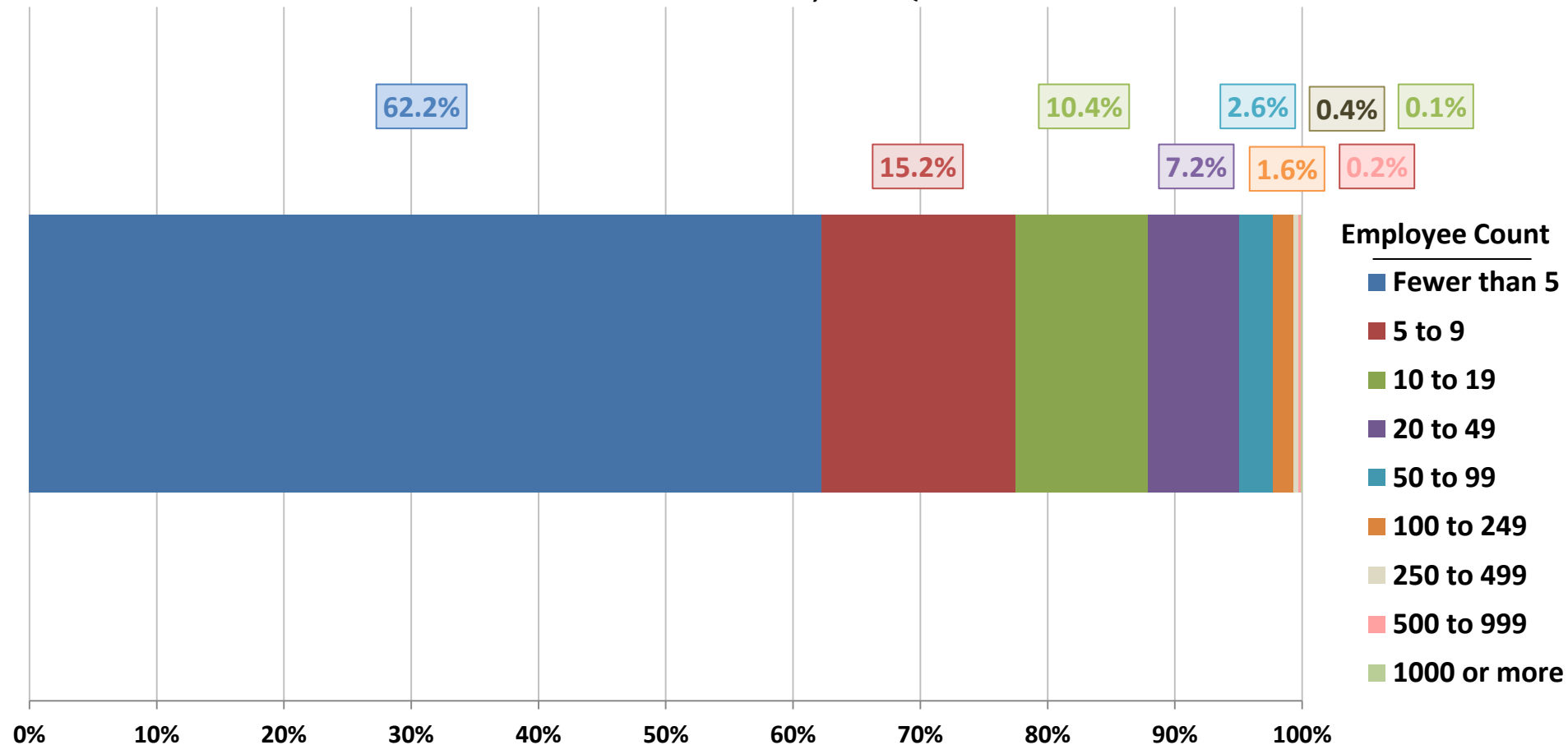
Employment Share by Industry

Arizona 2002-2012



Establishment Share by Establishment Size Across All Industries

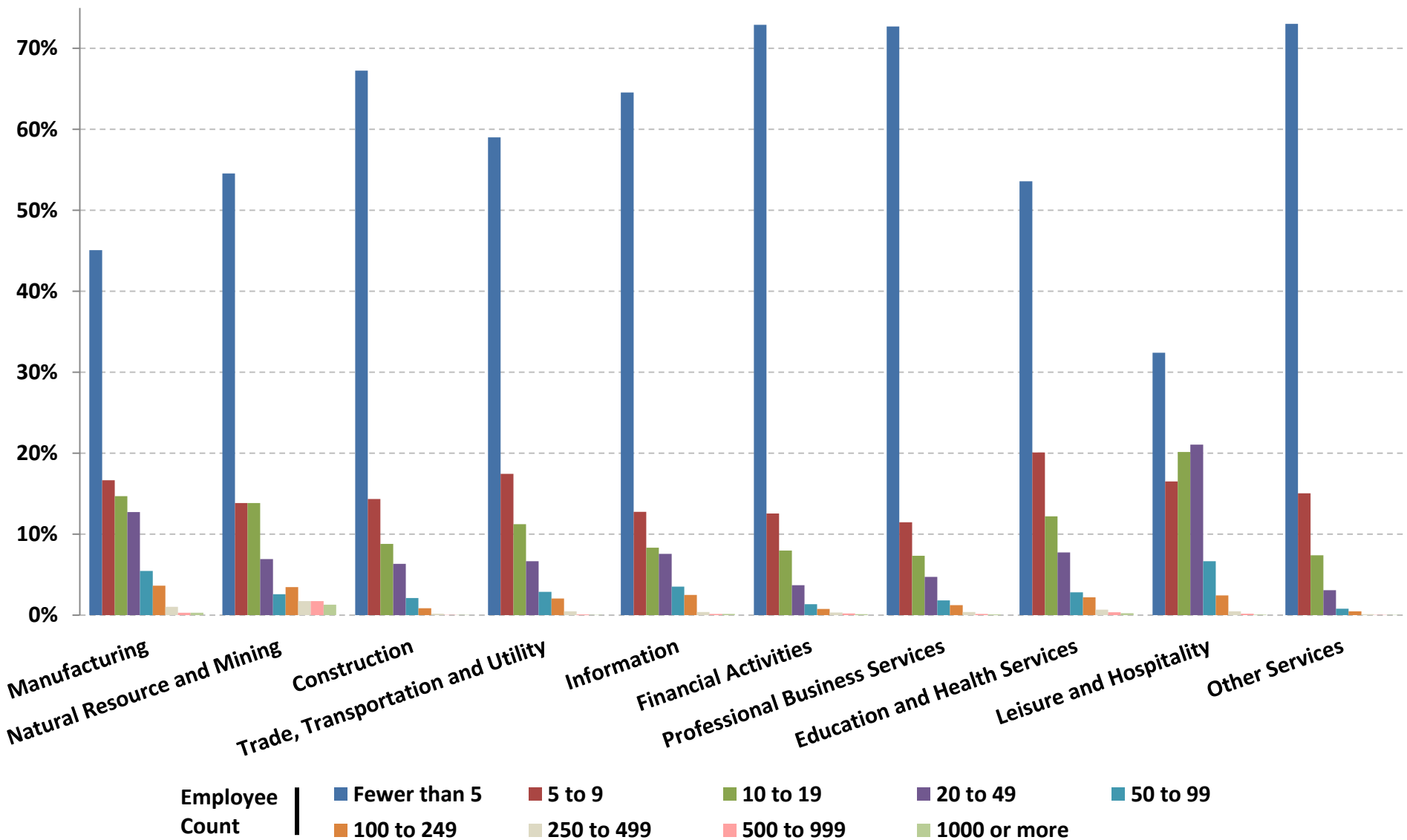
Arizona, 2012 Q1



62.2% of all establishments employ fewer than 5 individuals

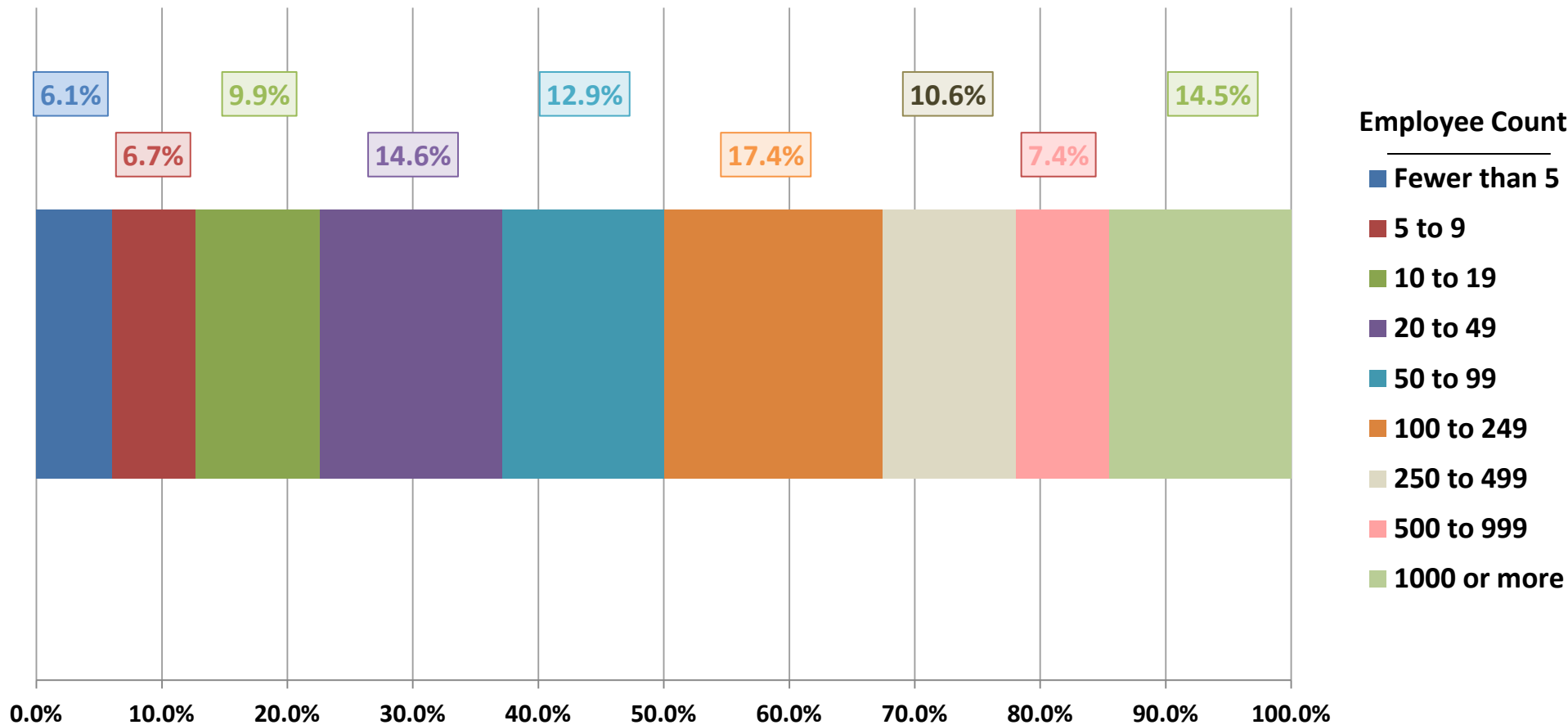
Establishment Share by Establishment Size Across Industries

Arizona, 2012 Q1



Employment Share by Establishment Size Across All Industries

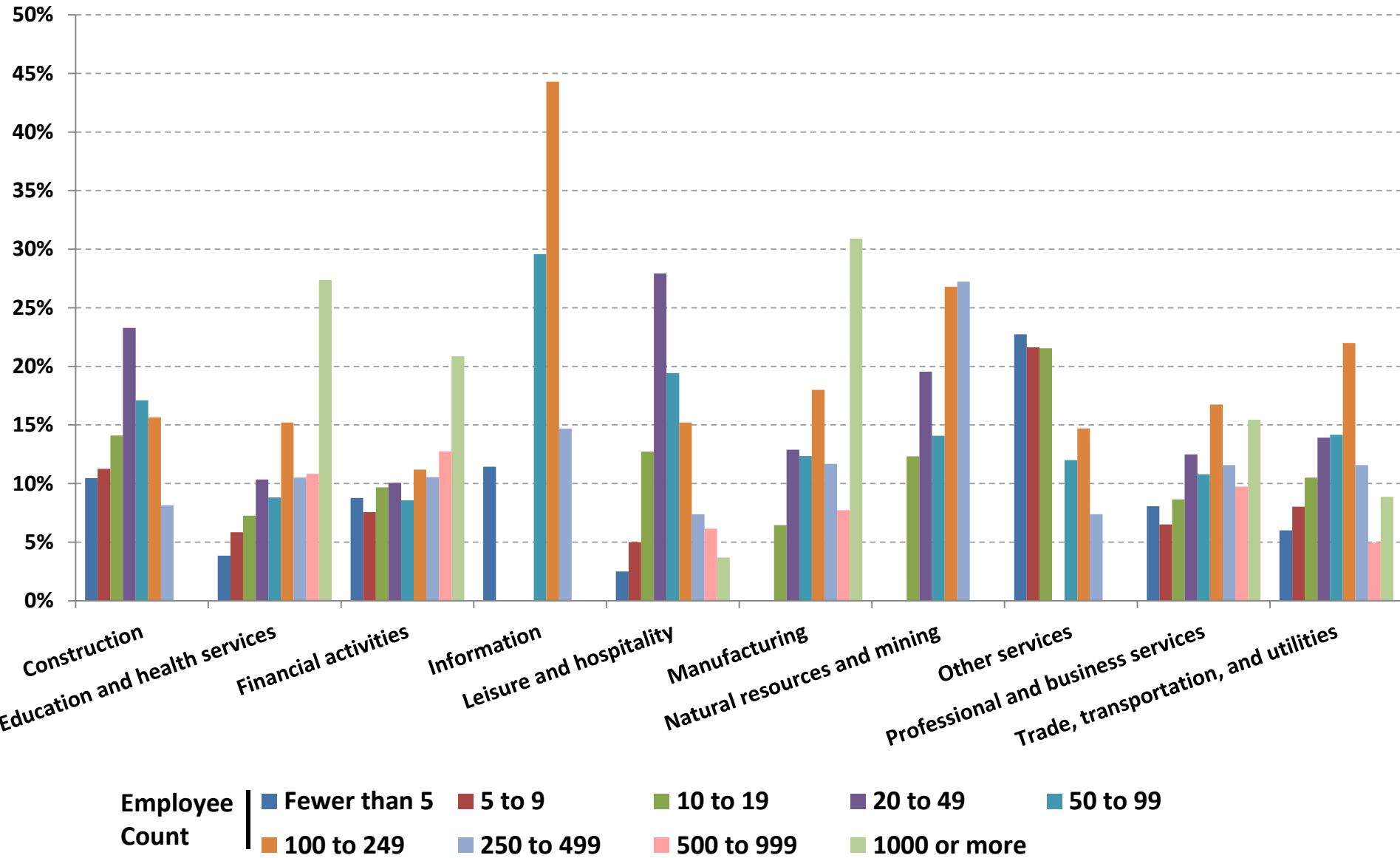
Arizona, 2012 Q1



Establishments that employ 1,000 or more individuals employ 14.5% of all workers

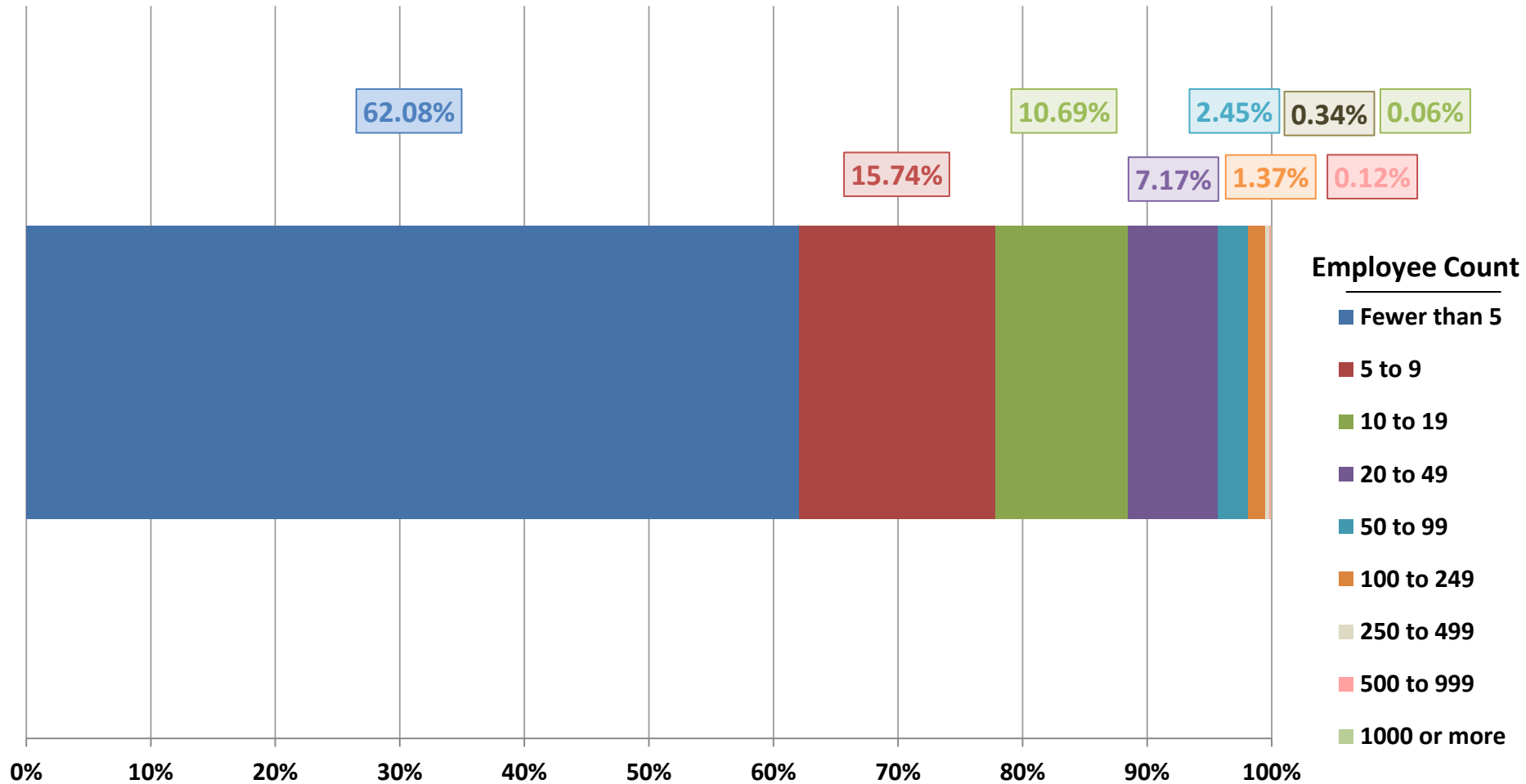
Employment Share by Establishment Size by Industry

Arizona, 2012 Q1



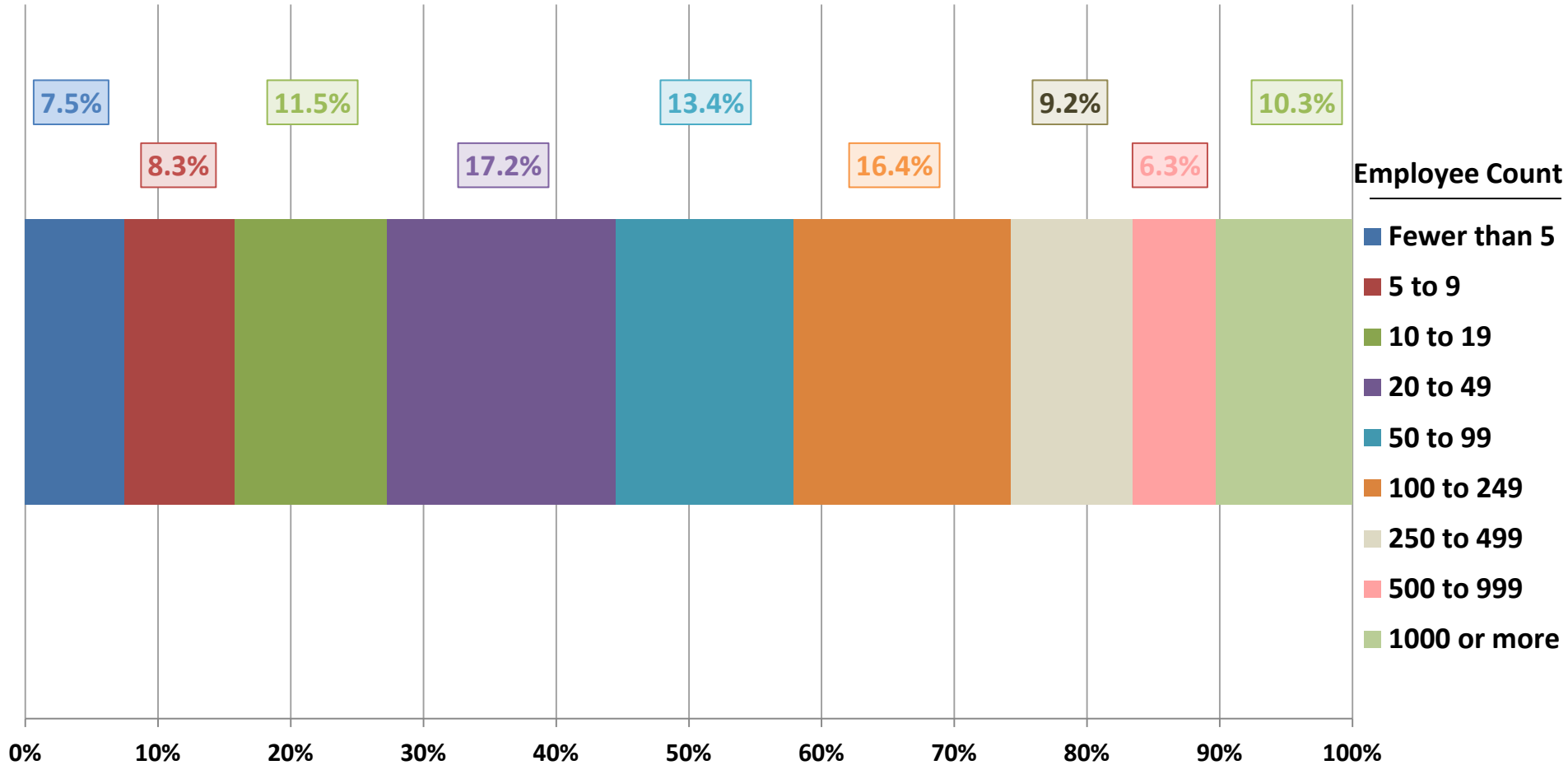
Establishment Share by Establishment Size Across All Industries

U.S., 2012 Q1



Employment Share by Establishment Size Across All Industries

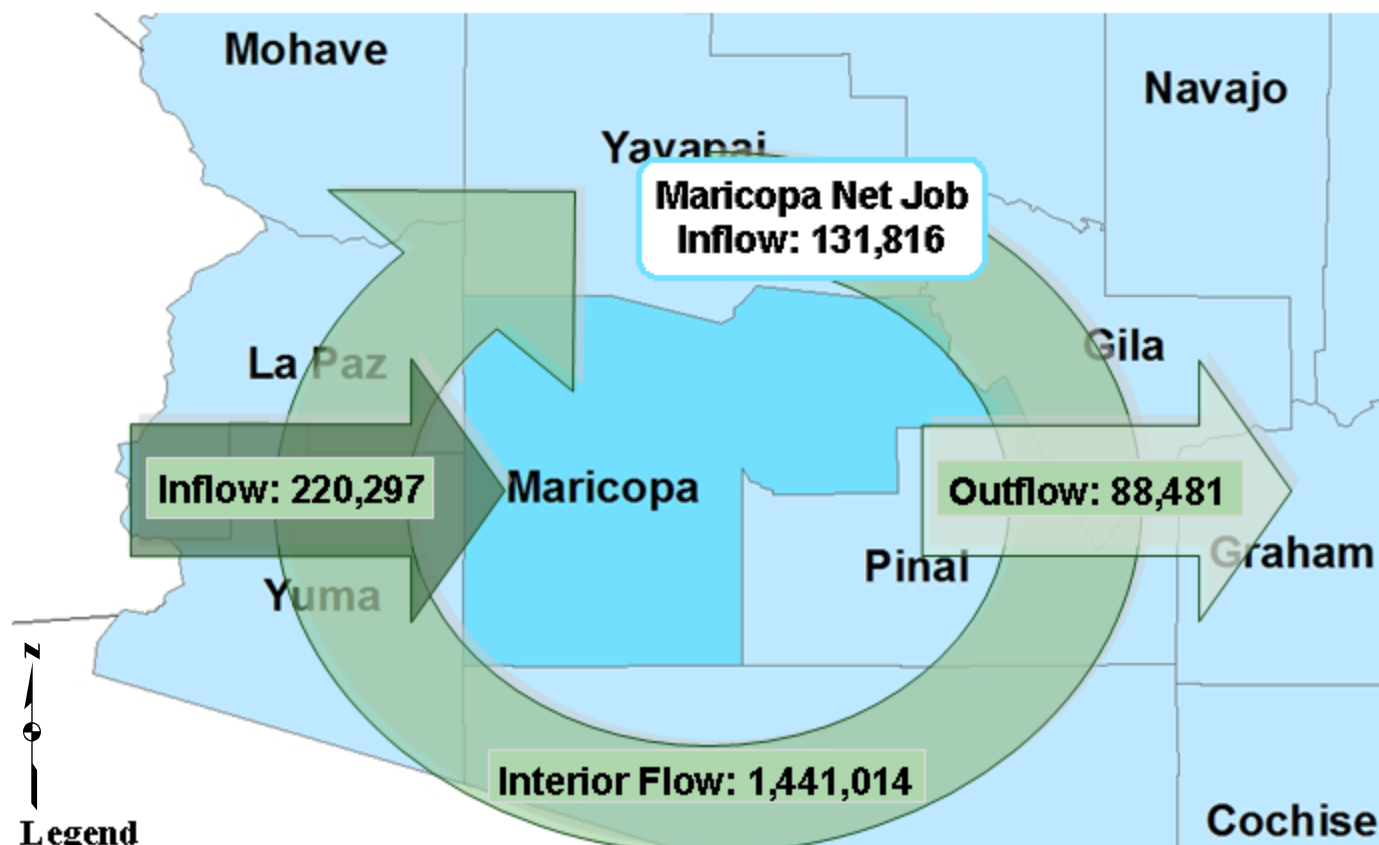
U.S., 2012 Q1





Jobs Inflow/Outflow

INFLOW / OUTFLOW JOB SUMMARY

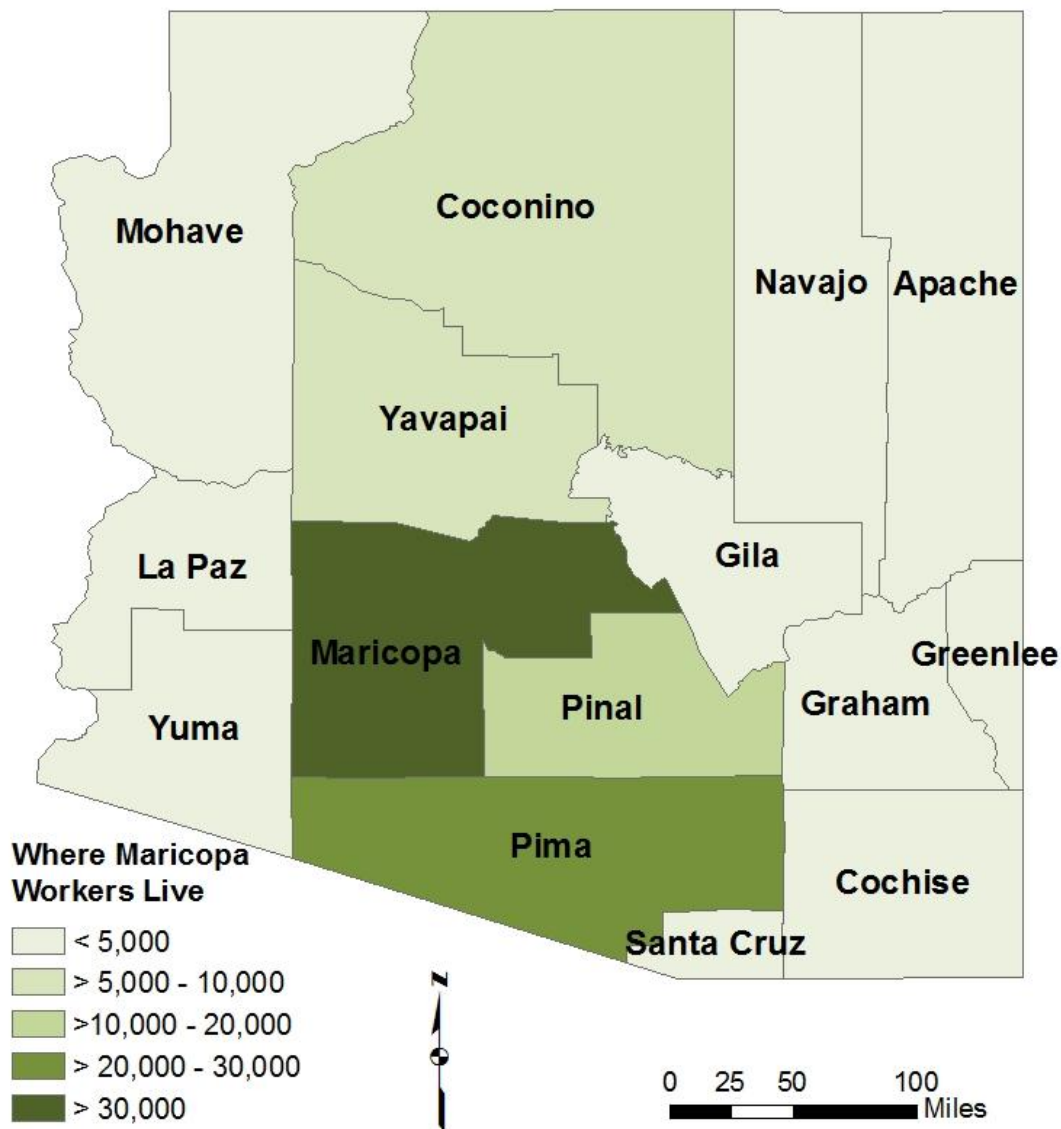


Legend

- Maricopa County Boundary
- Inflow: Employed in Maricopa County but lives outside the county
- Interior Flow: Both employed and living in Maricopa County
- Outflow: Lives in Maricopa County but employed outside

Note: Arrows do not indicate directionality of worker flow between home and employment locations.

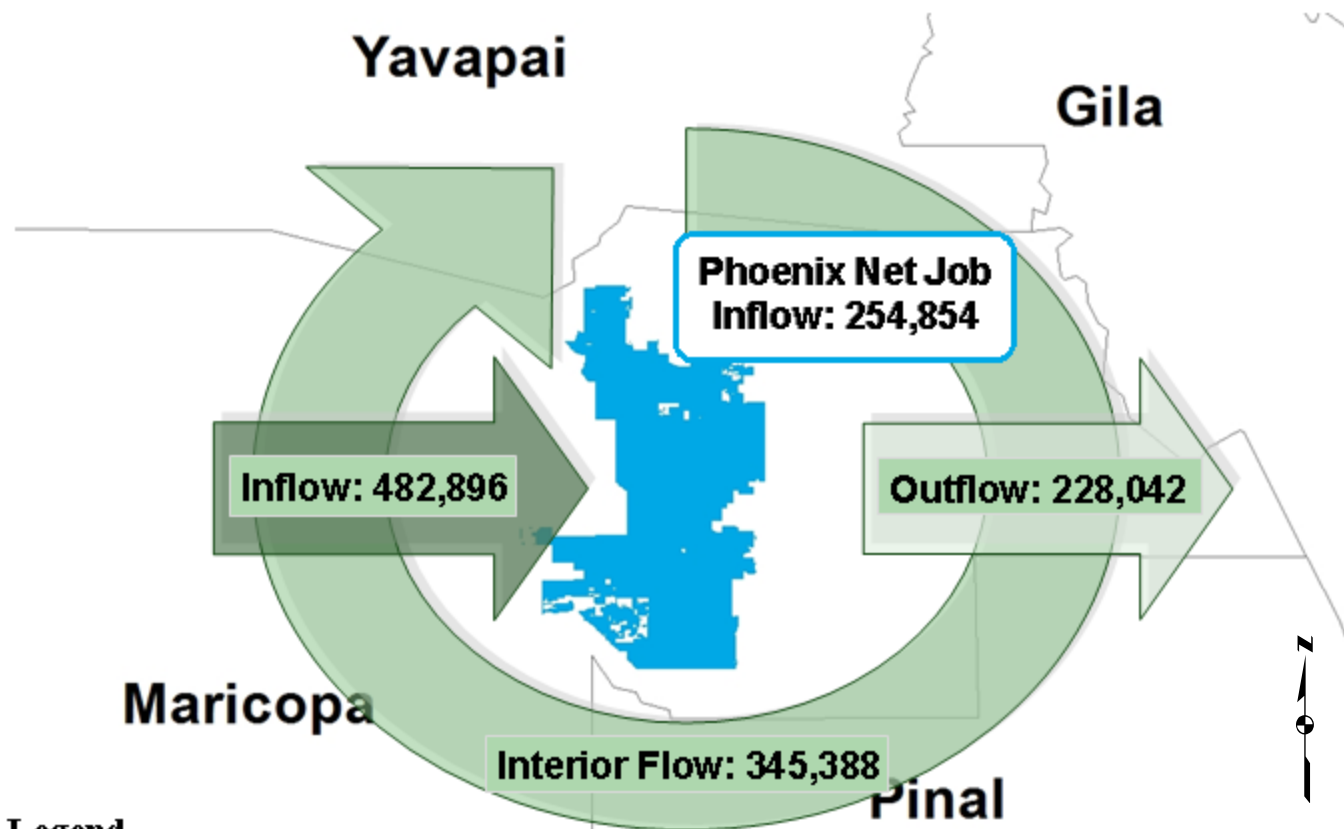
Source: U.S. Census Bureau, On The Map Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter 2011).



Where Maricopa Workers Live		
	Place	Count Share
1	Maricopa County, AZ	1,441,014 94.2%
2	Pima County, AZ	26,698 1.7%
3	Pinal County, AZ	13,618 0.9%
4	Yavapai County, AZ	6,178 0.4%
5	Coconino County, AZ	5,805 0.4%
6	Yuma County, AZ	3,554 0.2%
7	Mohave County, AZ	3,026 0.2%
8	Navajo County, AZ	2,865 0.2%
9	Cochise County, AZ	1,713 0.1%
10	Gila County, AZ	1,252 0.1%
11	Graham County, AZ	653 0.0%
12	Santa Cruz County, AZ	630 0.0%
13	La Paz County, AZ	581 0.0%
14	Apache County, AZ	454 0.0%
15	Greenlee County, AZ	109 0.0%

Source: U.S. Census Bureau, On The Map Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter 2011).

INFLOW / OUTFLOW JOB SUMMARY

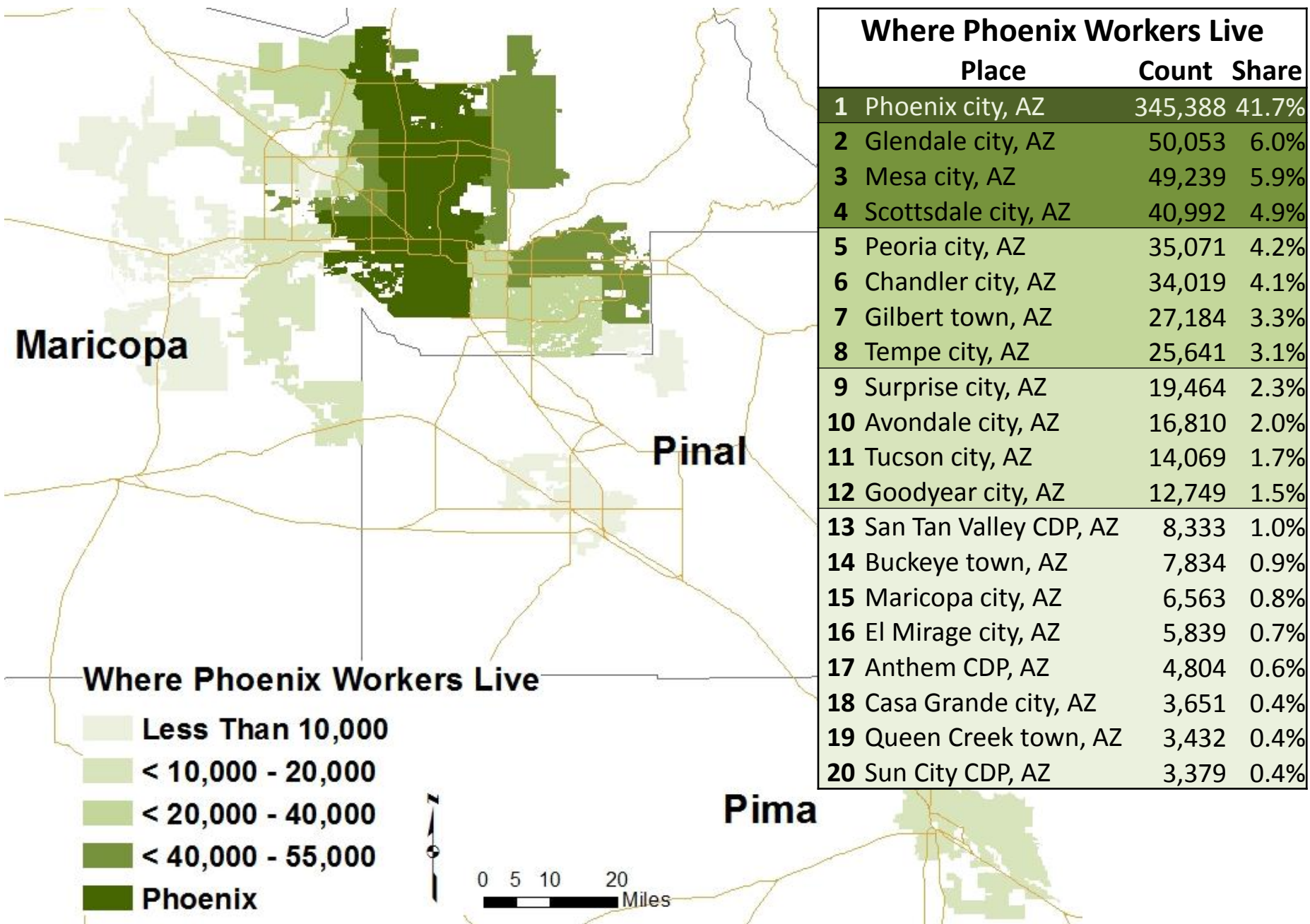


Legend

- Phoenix City Boundary
- Inflow: Employed in Phoenix but lives outside the city
- Interior Flow: Both employed and living in Phoenix
- Outflow: Lives in Phoenix but employed outside

Note: Arrows do not indicate directionality of worker flow between home and employment locations.

Source: U.S. Census Bureau, On The Map Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter 2011).



Source: U.S. Census Bureau, On The Map Application and LEHD Origin-Destination Employment Statistics (Beginning of Quarter Employment, 2nd Quarter 2011).

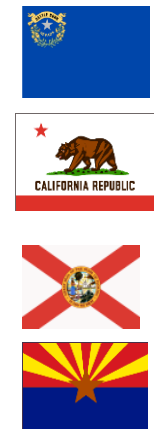
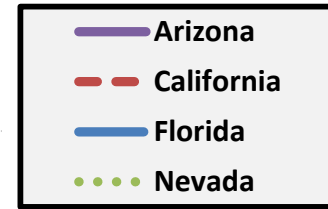
A light blue map of the state of Washington is centered in the background. The map shows the state's outline, including the irregular coastline on the west and the panhandle on the north. A dark blue horizontal bar is superimposed over the middle of the map.

Unemployment Overview

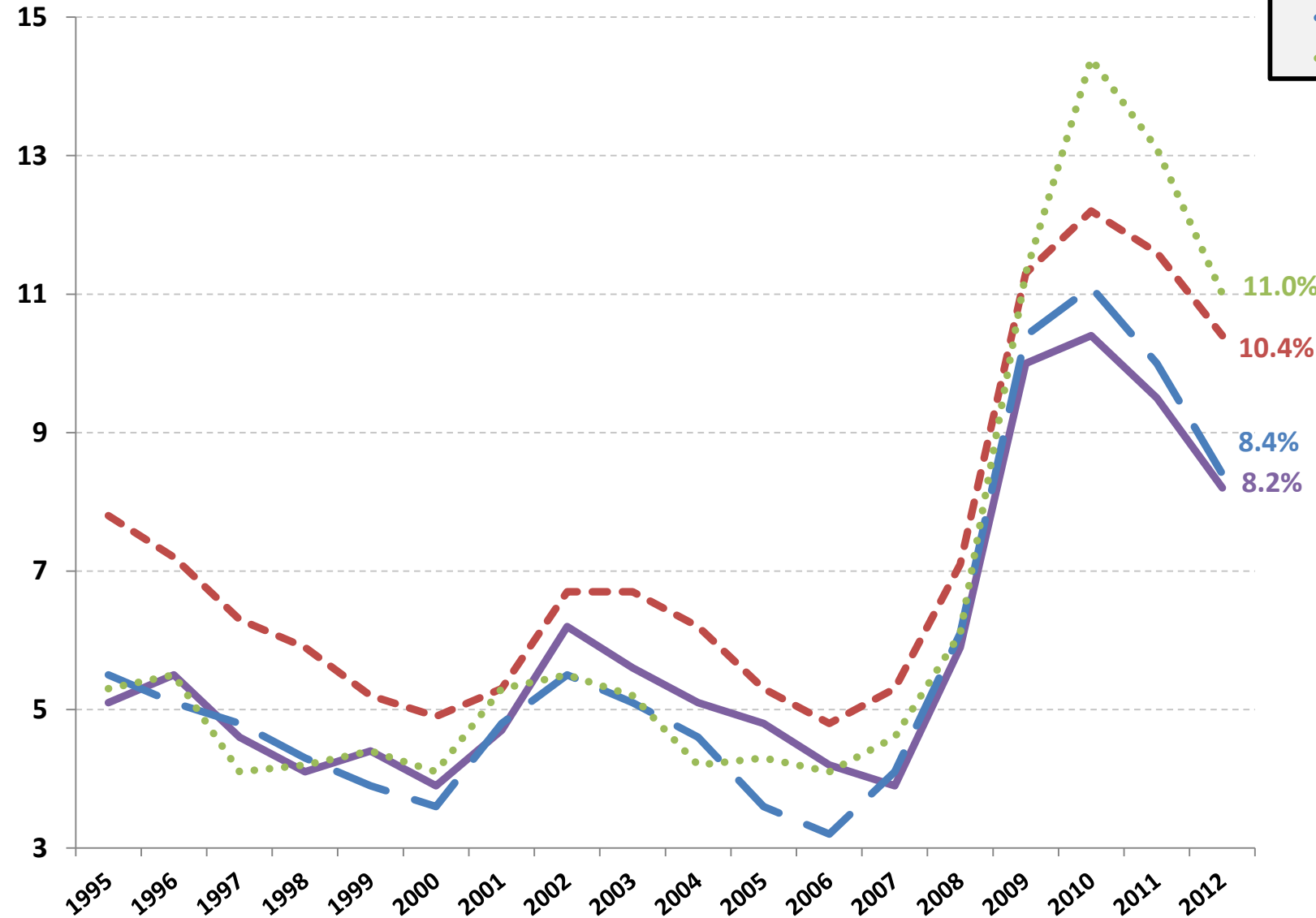
Unemployment Defined

- **Unemployed:** People who do not have a job, have actively looked for work in the prior 4 weeks, and are currently available for work
- **Unemployment Rate:** This is the number of unemployed persons as a percent of the civilian labor force

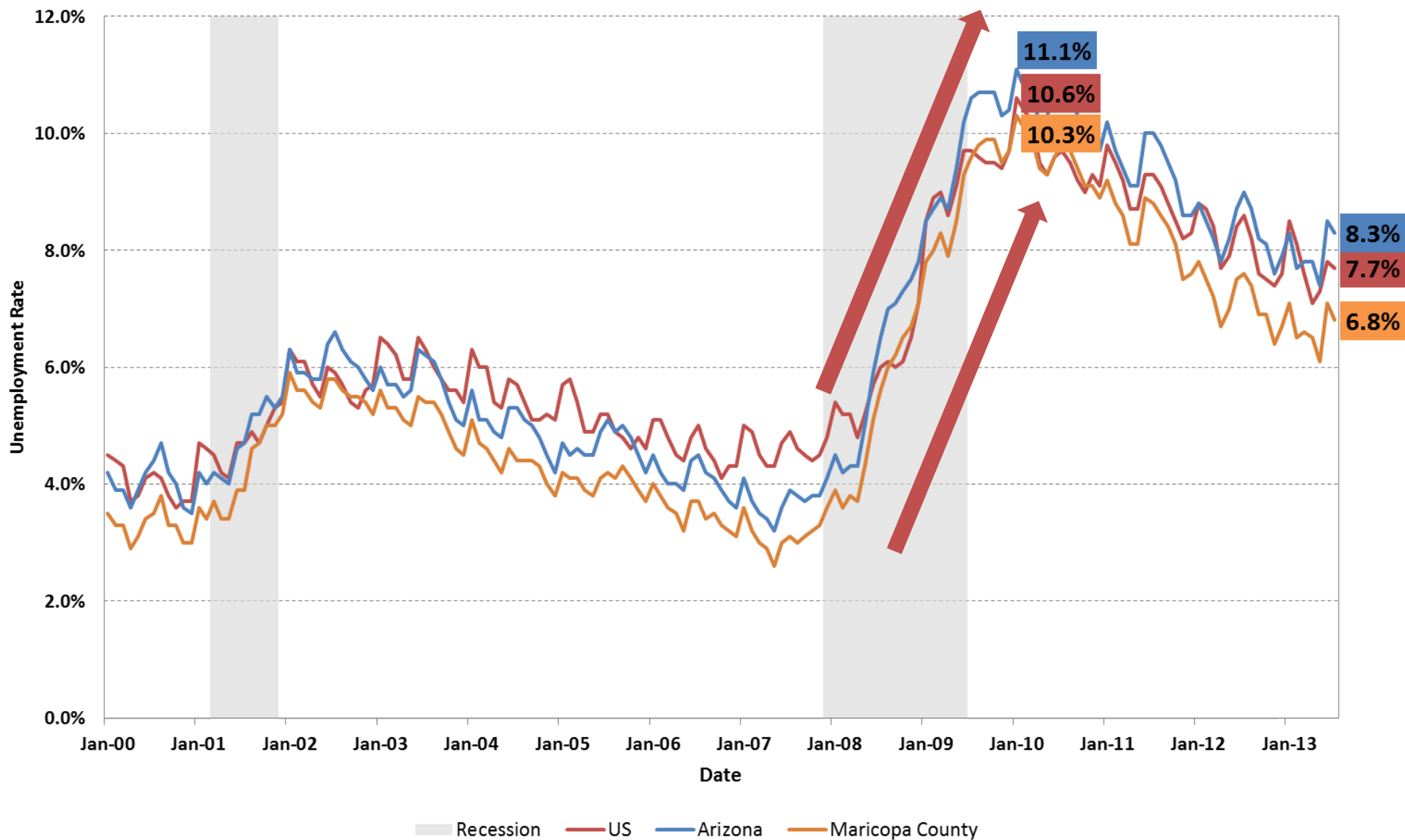
Unemployment Rate 1995-2012, Annual Averages



Rate



Unemployment Rate, Not Seasonally Adjusted

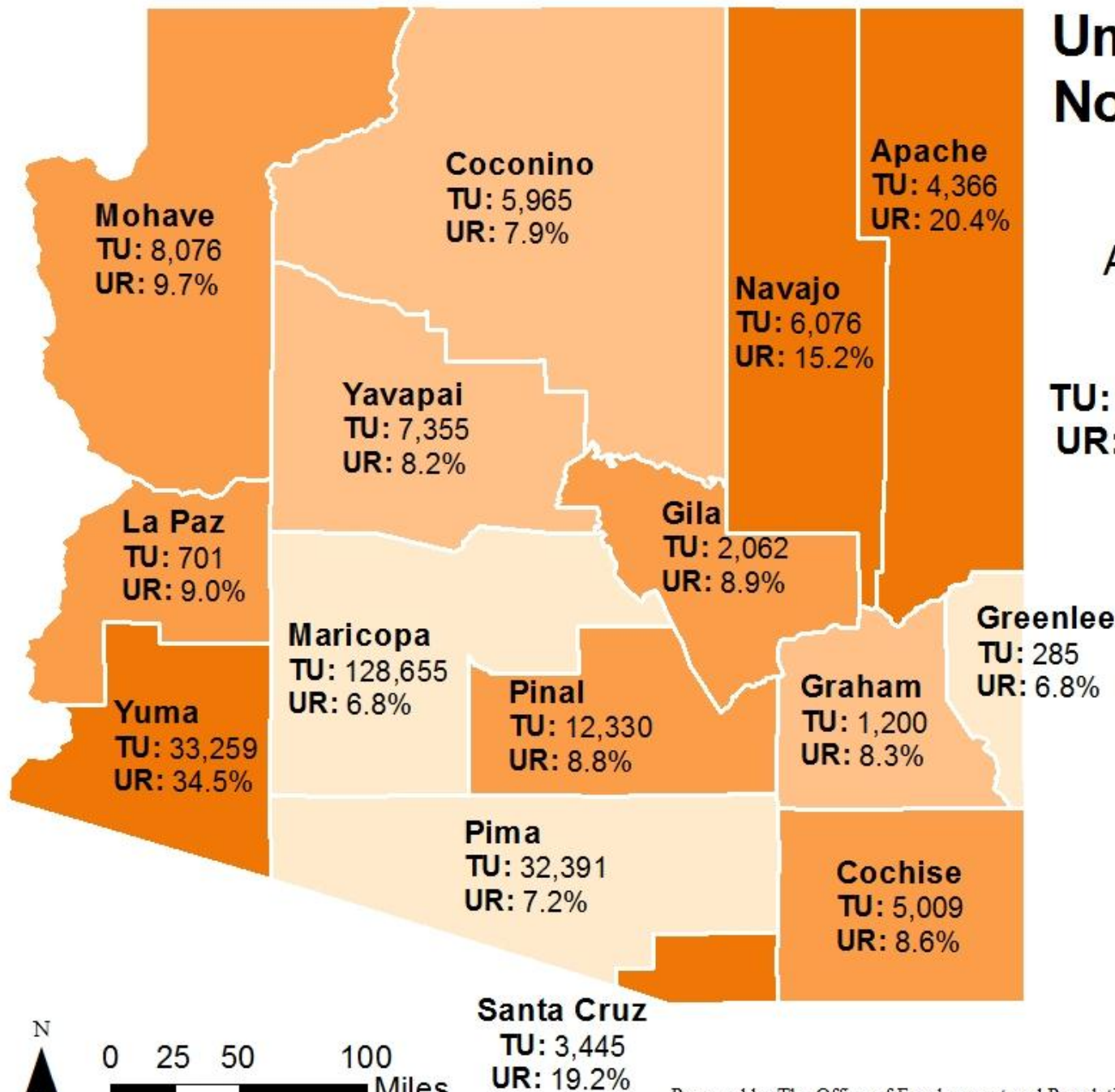


Source: U.S. Department of Labor, Bureau of Labor Statistics

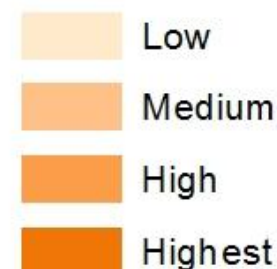
Unemployment, Not Seasonally Adjusted

Arizona Counties,
July 2013

TU: Total Unemployment;
UR: Unemployment Rate



Unemployment Rate



0 25 50 100
Miles

Prepared by The Office of Employment and Population Statistics, <http://www.workforce.az.gov/>

Source: U.S. Department of Labor, Bureau of Labor Statistics

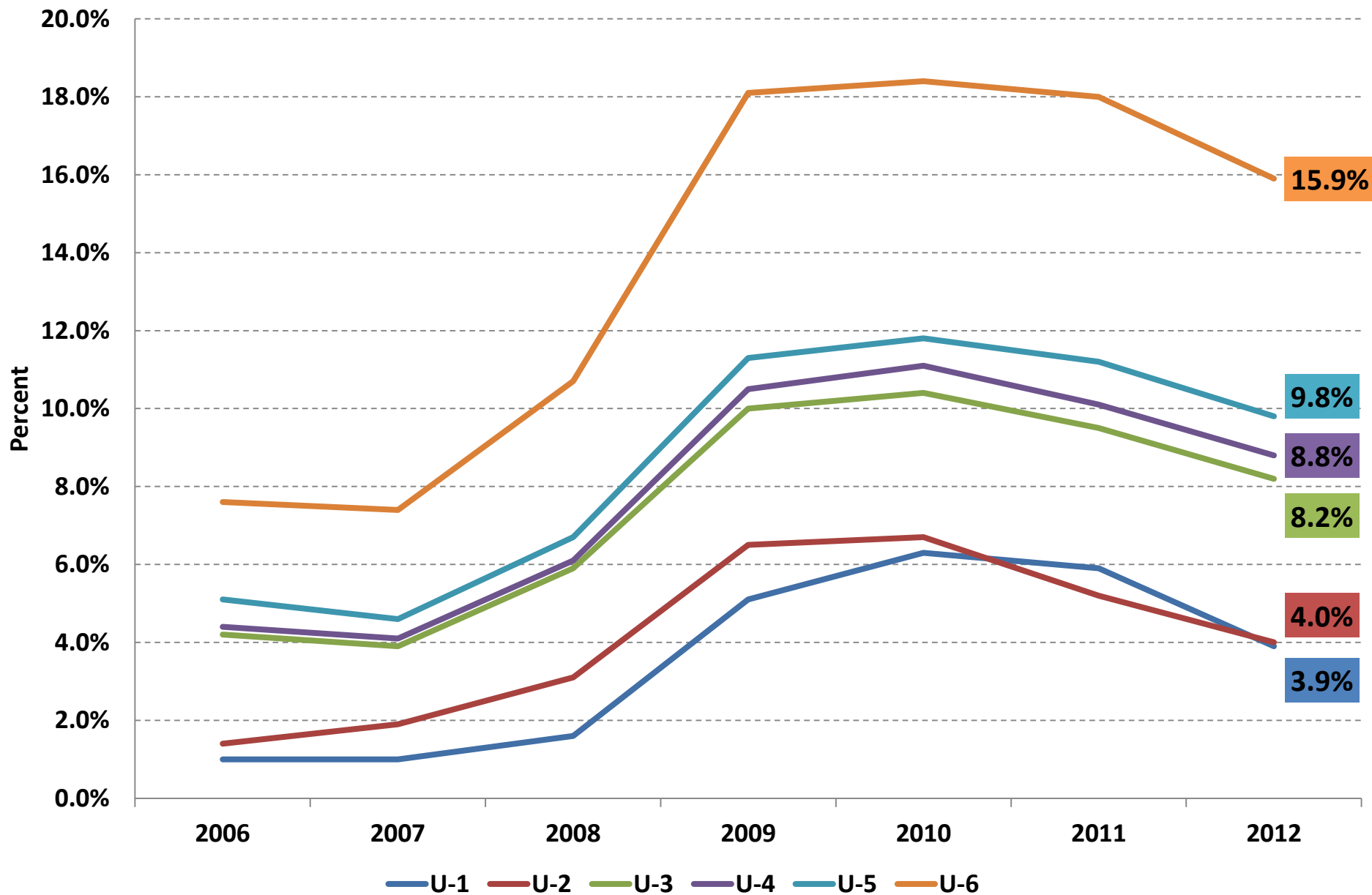
Alternative Unemployment Definitions

Source: U.S. Department of Labor, Bureau of Labor Statistics

- **U1:** Persons unemployed 15 weeks or longer, as a percent of the civilian labor force
- **U2:** Job losers and persons who completed temporary jobs , as a percent of the civilian labor force
- **U3:** Total unemployed, as a percent of the civilian labor force (official unemployment rate)
- **U4:** U3 + discouraged workers (have given a job-market related reason for not currently looking for work), as a percent of the civilian labor force plus discouraged workers
- **U5:** U4 + all other marginally attached workers (indicate that they want and are available for a job and have looked for work sometime in the past 12 months), as a percent of the civilian labor force plus all persons marginally attached to the labor force
- **U6:** U5 + employed part time for economic reasons, as a percent of the civilian labor force plus all persons marginally attached to labor force

Alternative Unemployment Measures

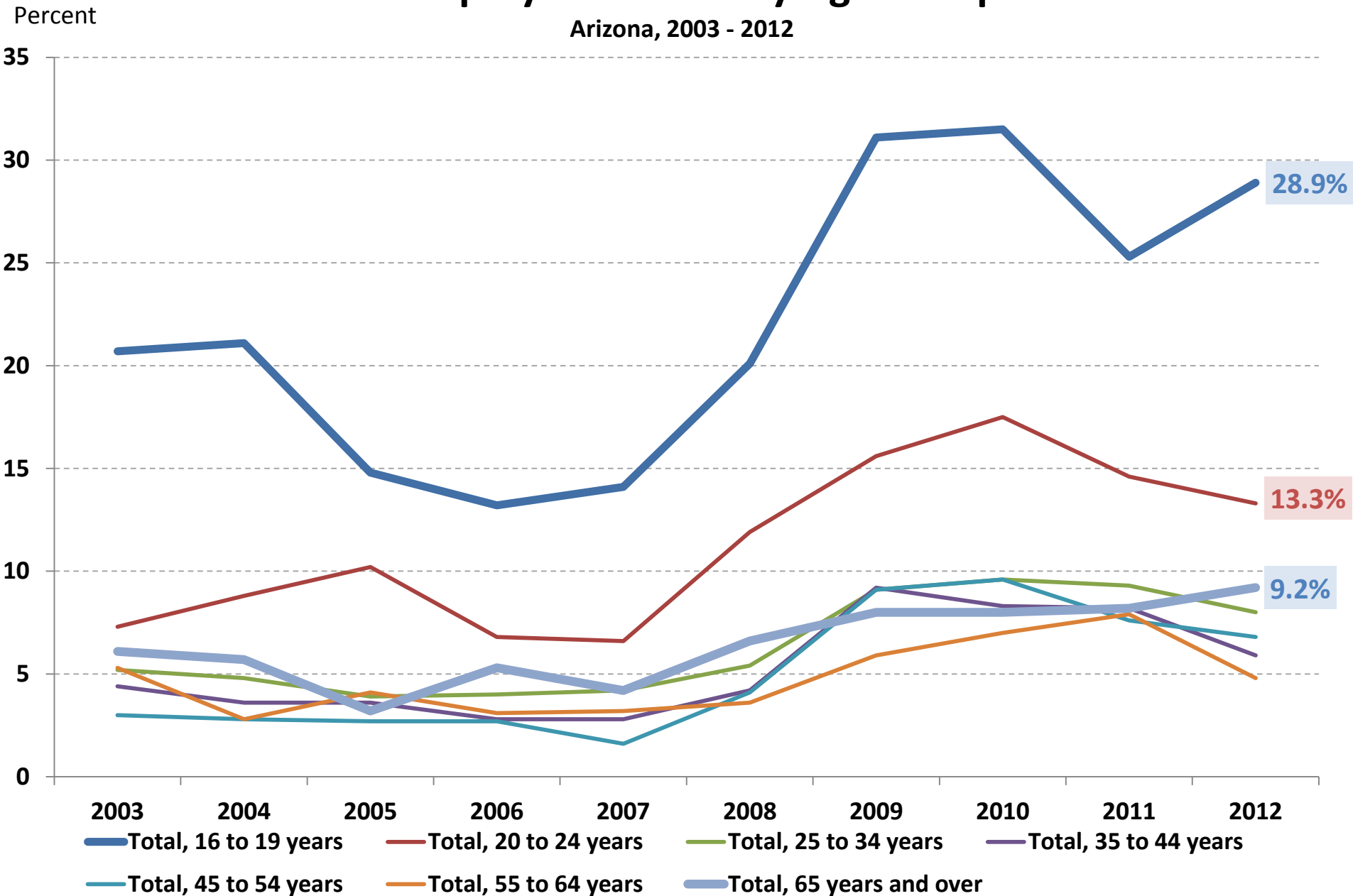
Arizona, Annual Averages



Source: U.S. Department of Labor, Bureau of Labor Statistics

Unemployment Rate by Age Groups

Arizona, 2003 - 2012

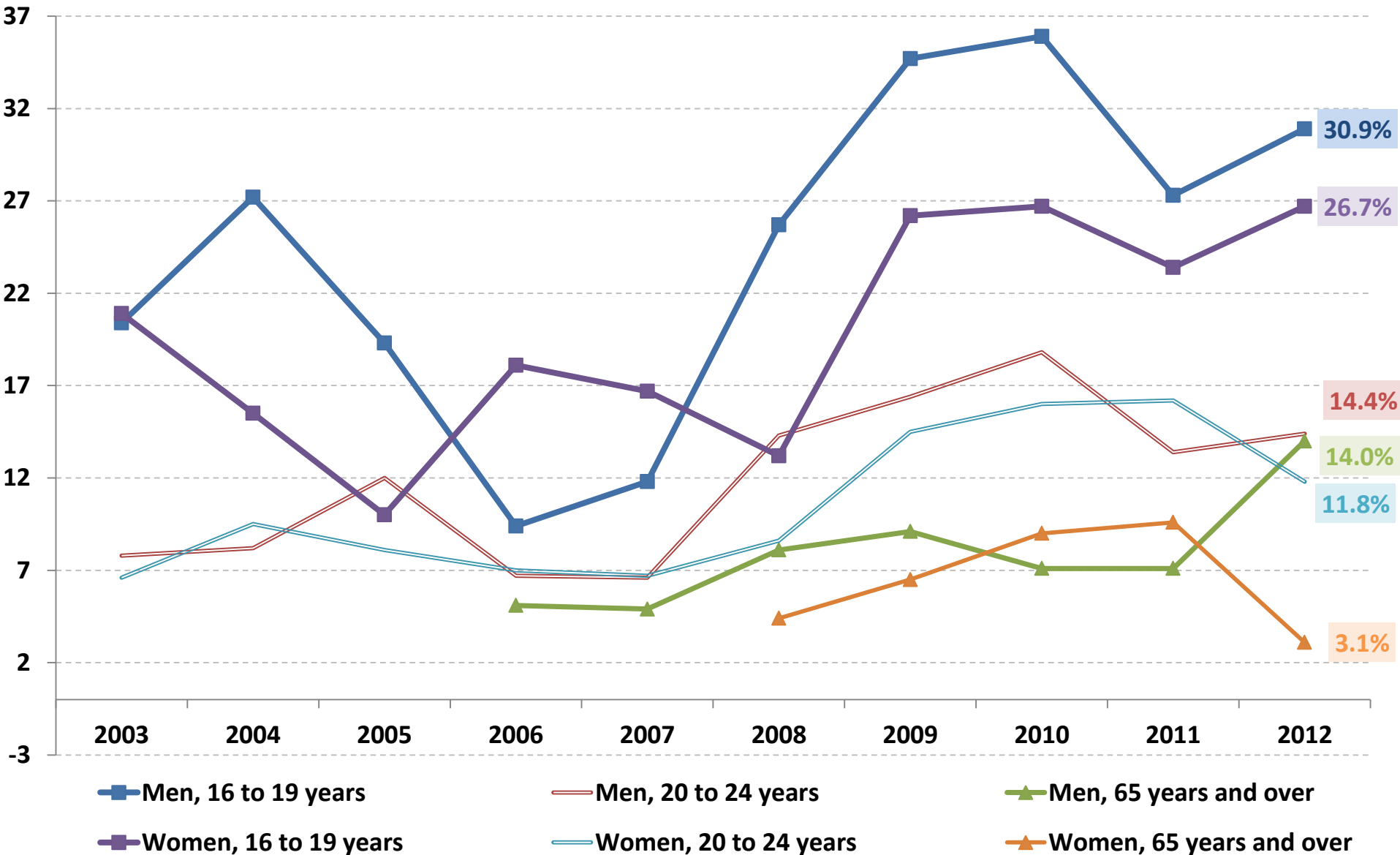


Source: U.S. Department of Labor, Bureau of Labor Statistics

Unemployment Rate by Age Group and Gender

Arizona, 2003 - 2012

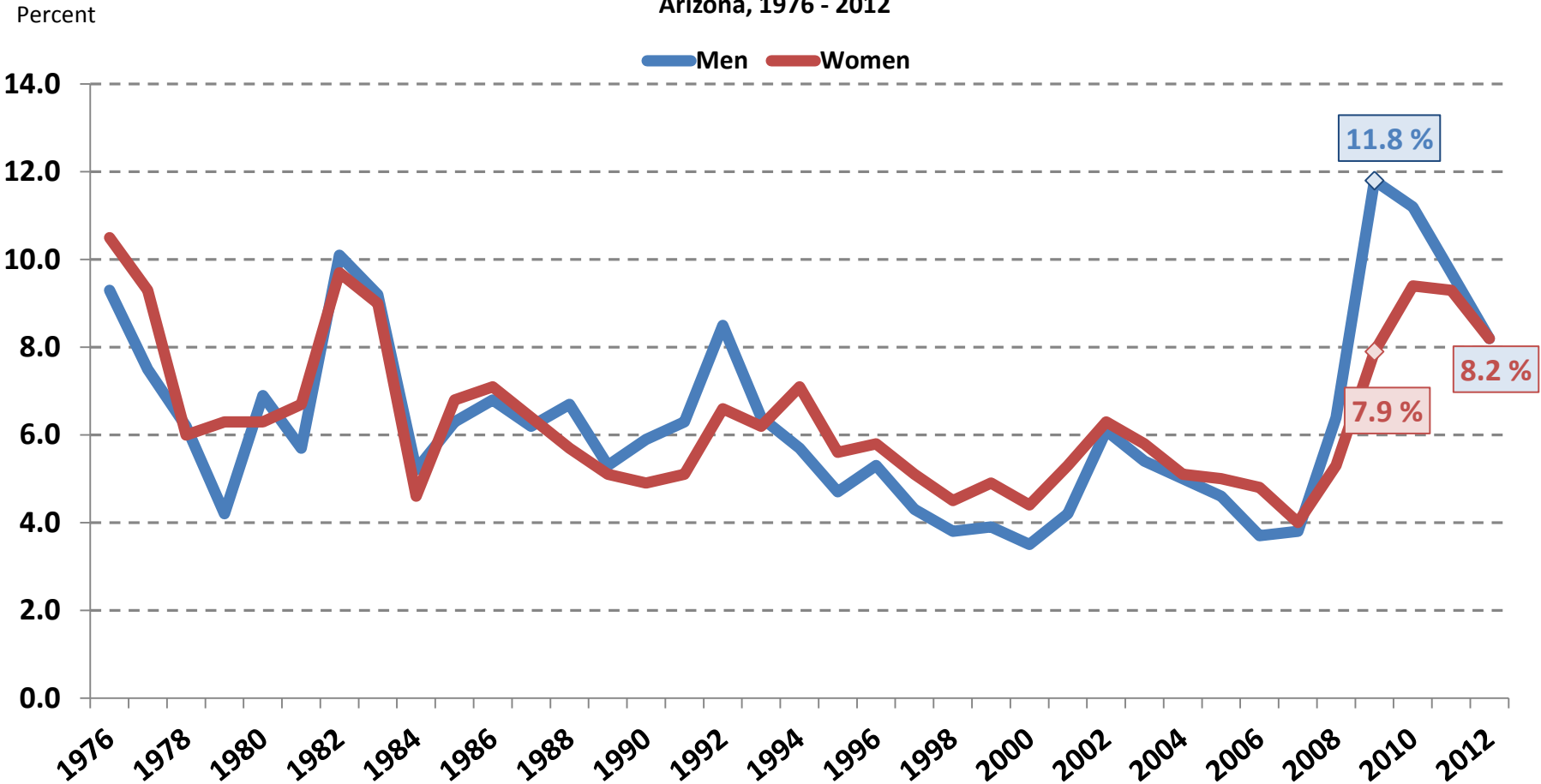
Percent



Source: U.S. Department of Labor, Bureau of Labor Statistics

Unemployment Rate by Gender

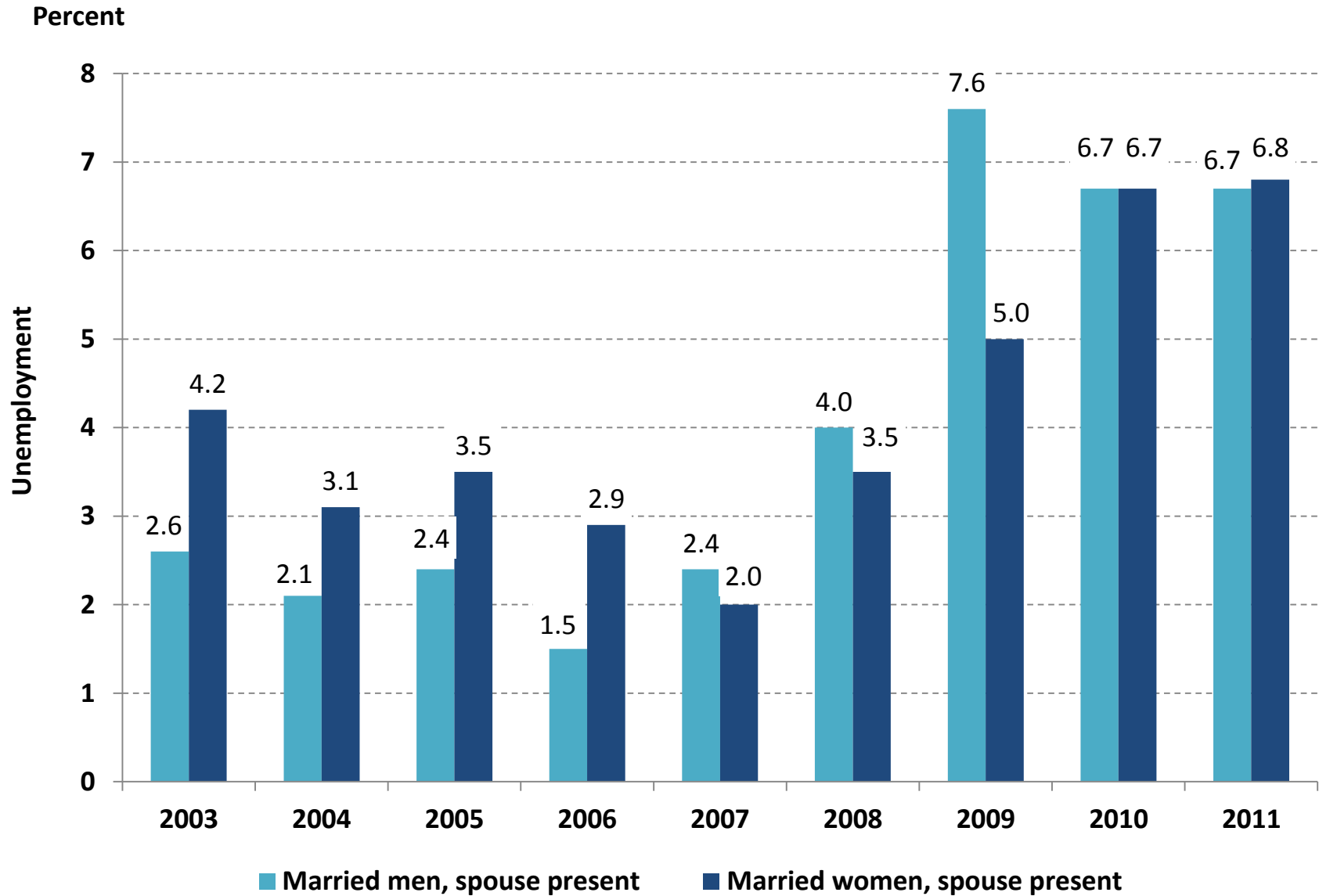
Arizona, 1976 - 2012



Increase in Male unemployment rate in 2009 attributed to losses in Construction

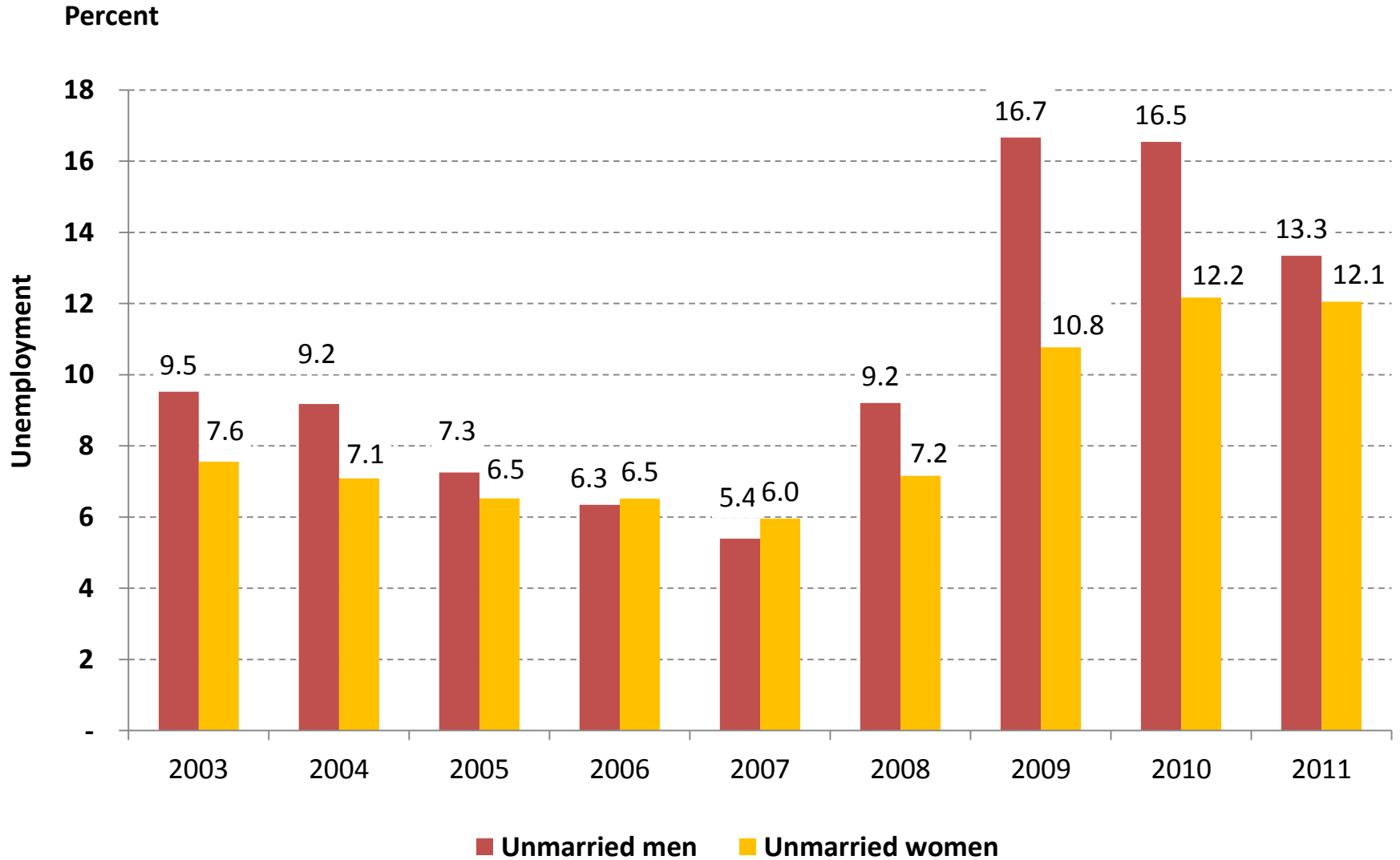
Unemployment Rate

Arizona, Married Men and Women



Unemployment Rate

Arizona, Unmarried Men and Women

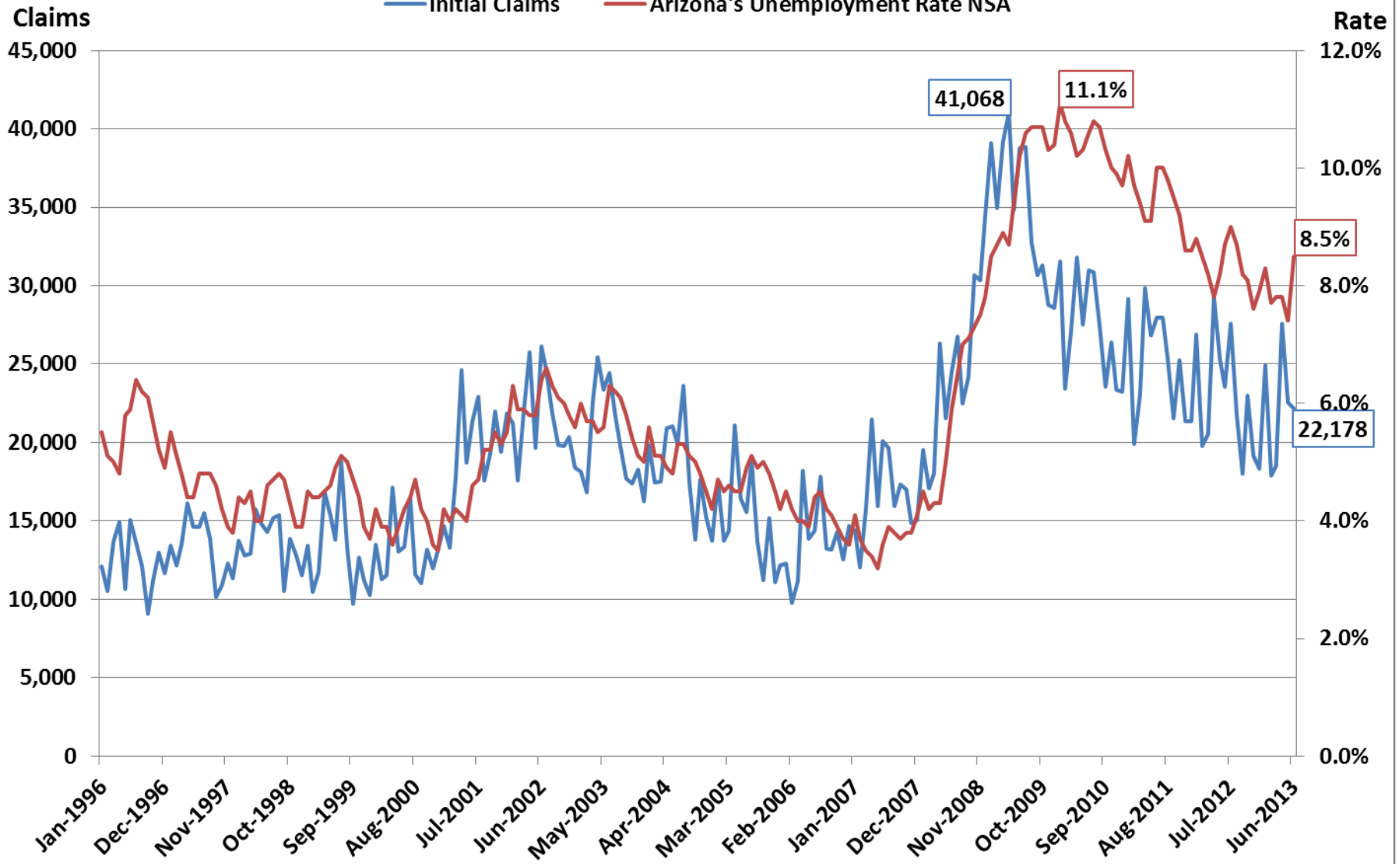


Unemployment Insurance (UI)

- Unemployment insurance benefits provide temporary financial assistance to workers unemployed through no fault of their own.

Initial Unemployment Claims has a Direct Relationship with Arizona's Unemployment Rate (NSA)

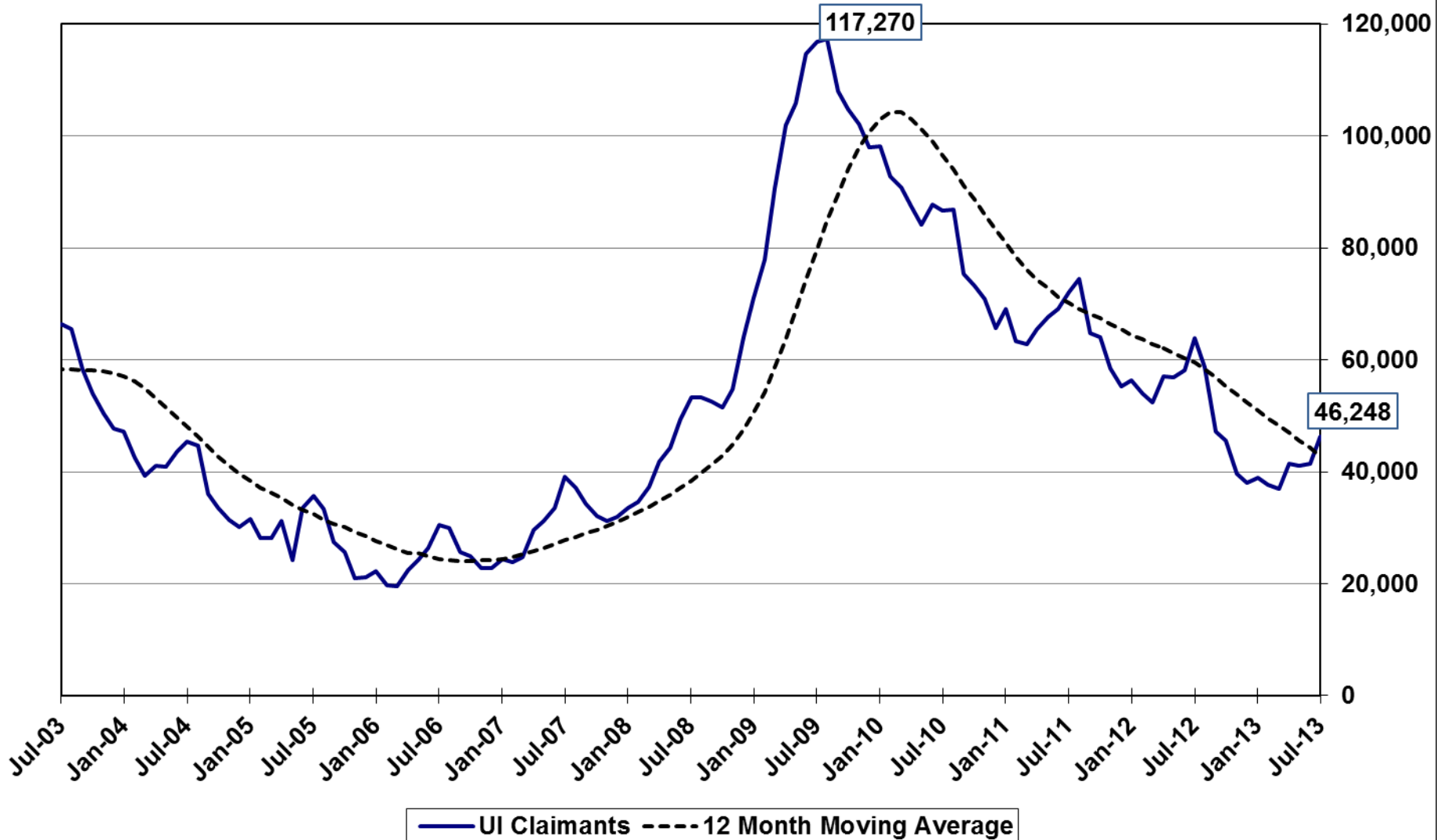
Initial Claims Arizona's Unemployment Rate NSA



Source: Special report from Arizona Department of Economic Security, Systems and Programming

Claimants Receiving Unemployment Insurance Benefits

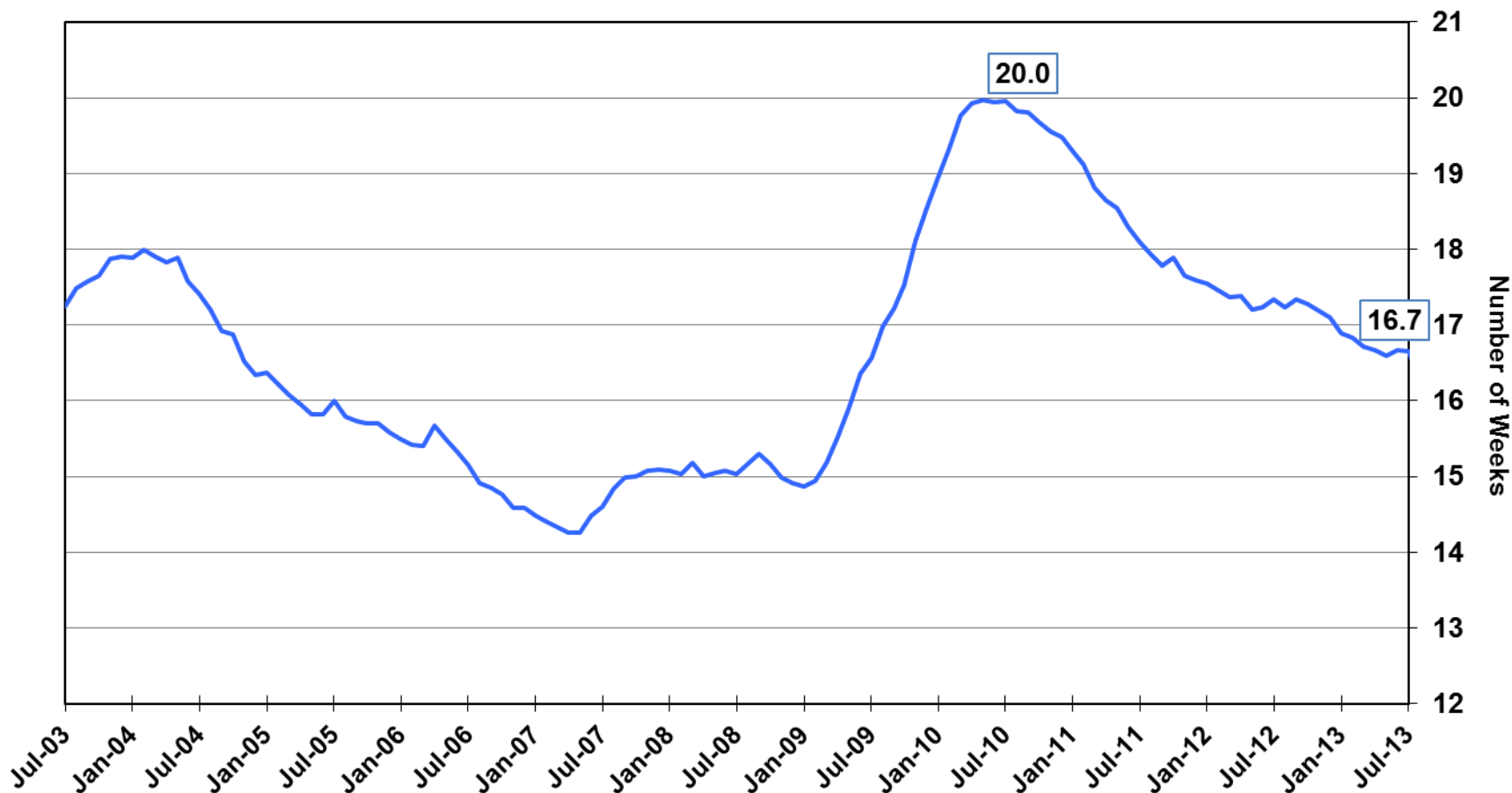
from July 2003 to July 2013



Source: Special report from Arizona Department of Economic Security, Systems and Programming

Average Duration of Unemployment Insurance Payments from July 2003 to July 2013

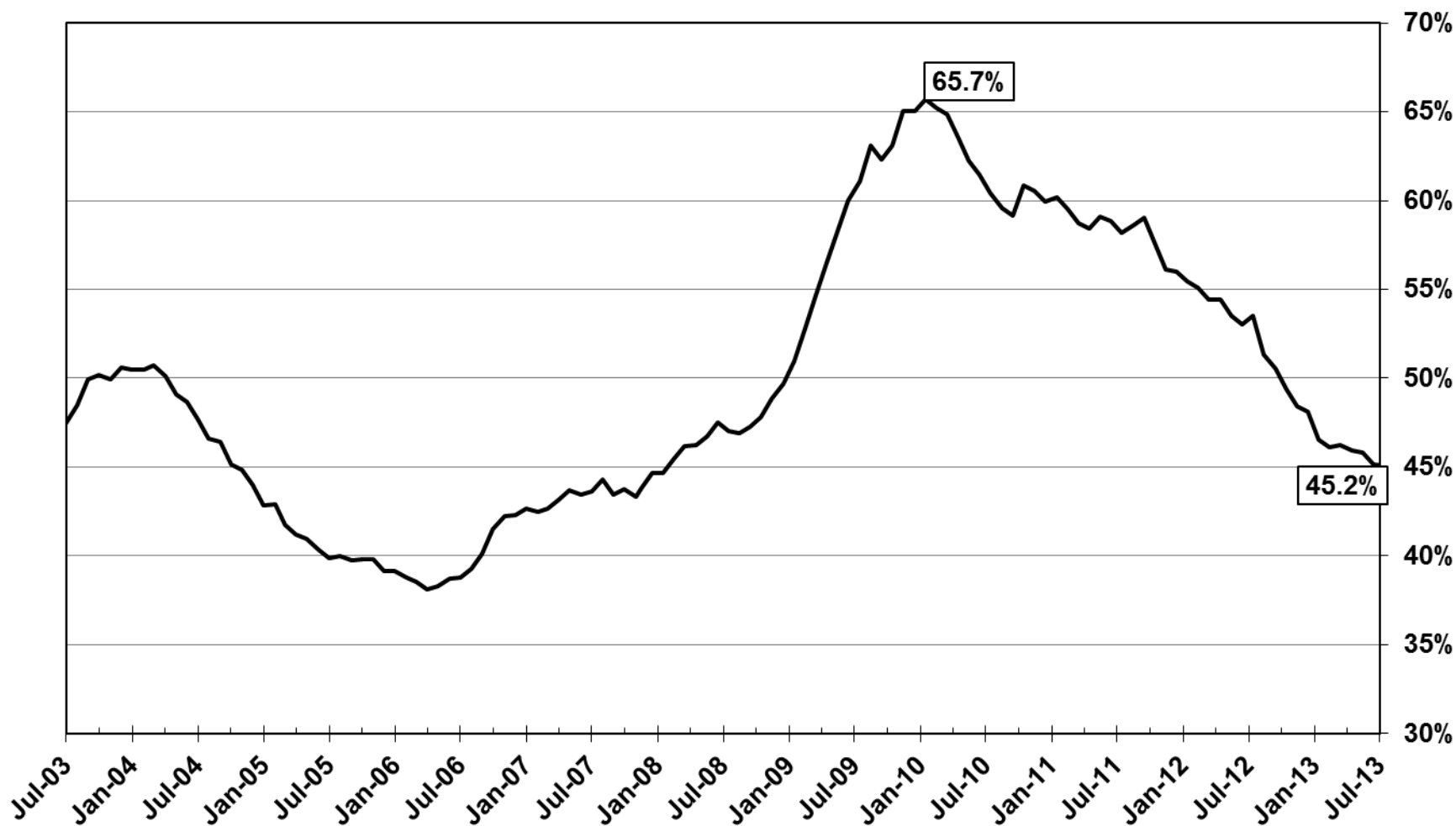
Calculation method: Divide 12 months of continued claims by 12 months of initial claims



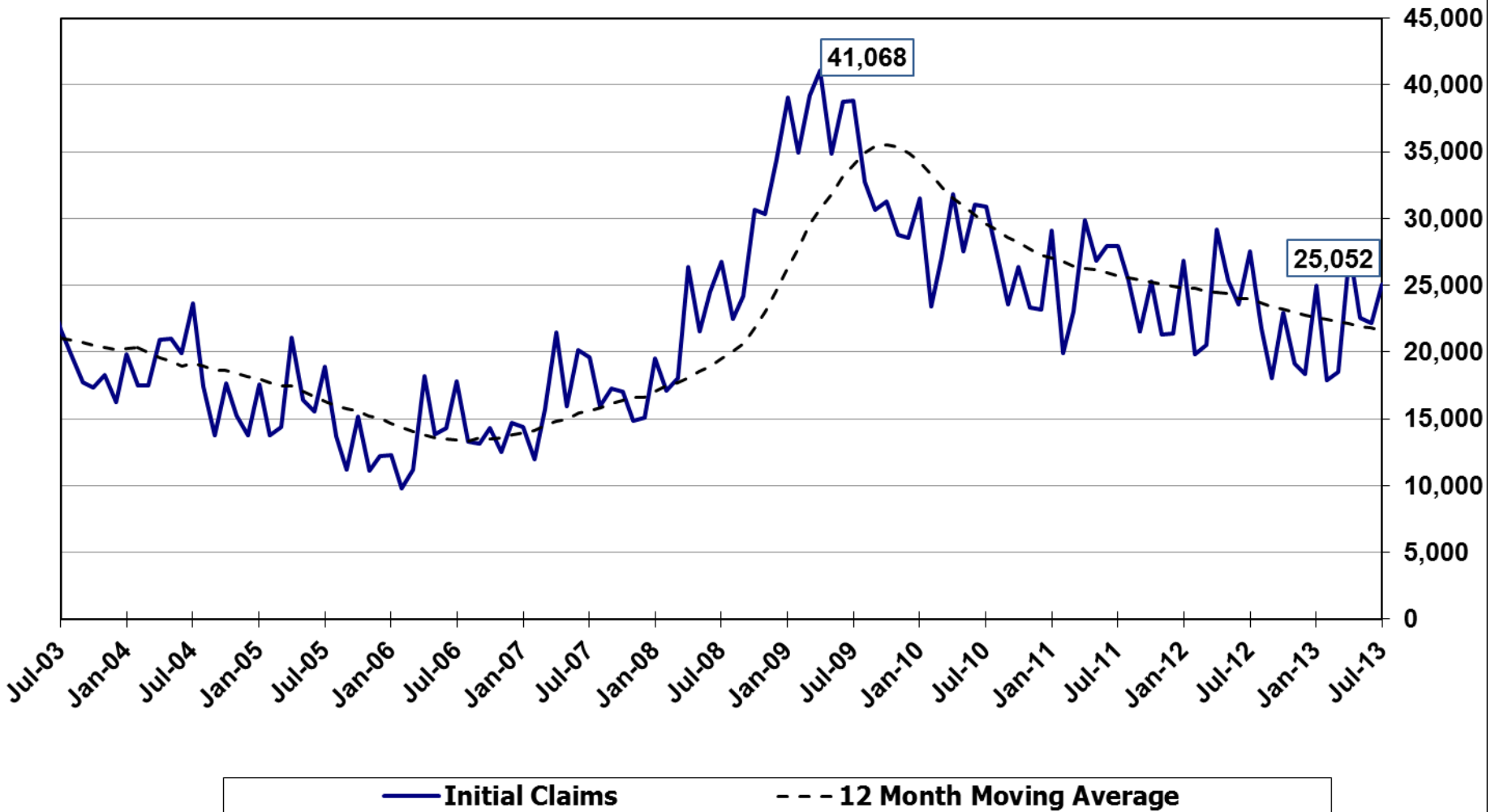
Unemployment Insurance Exhaustion Rate from July 2003 to July 2013

12-Month Moving Average

Calculation method: Final payments as a percentage of first payments from six months earlier.

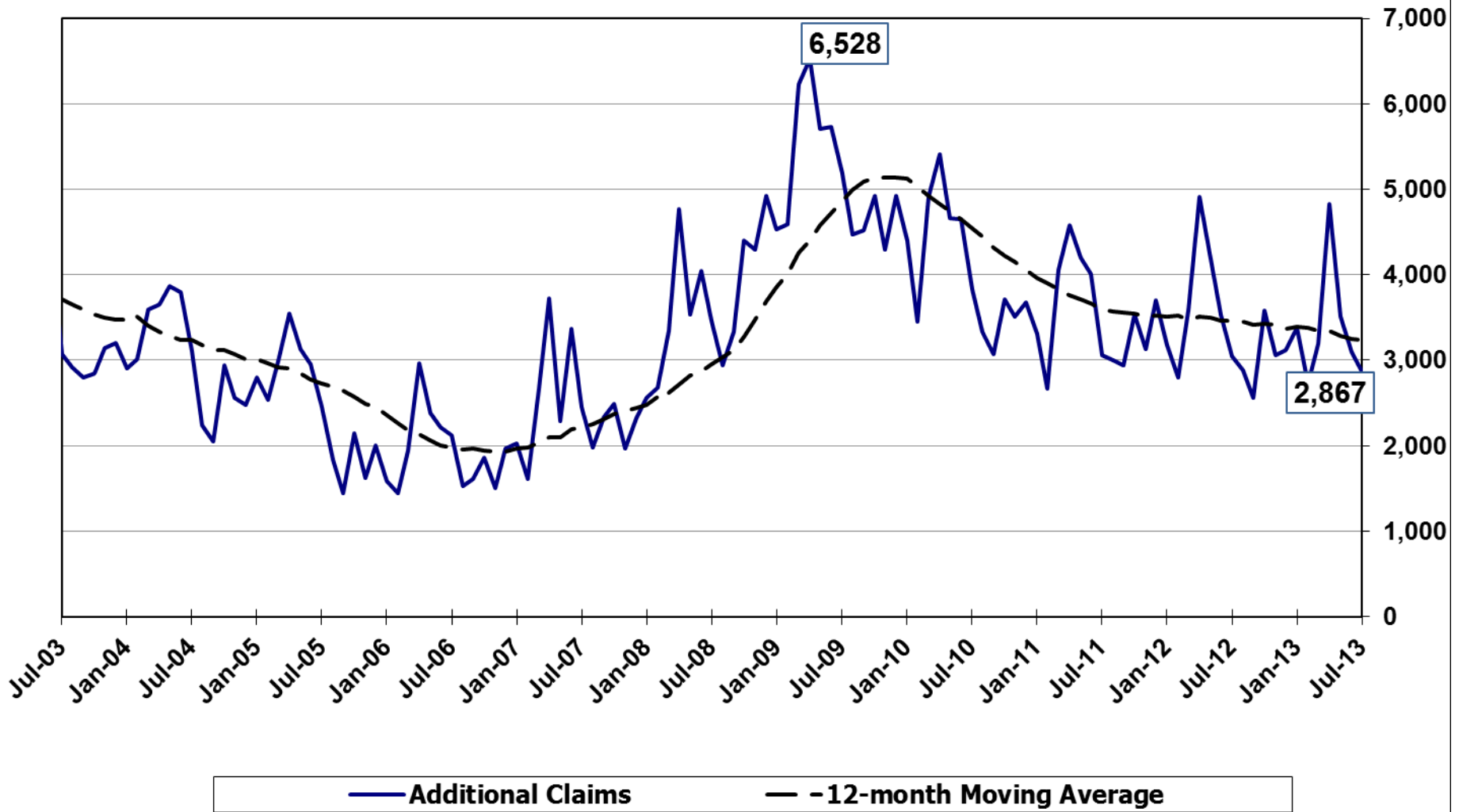


Initial Claims from July 2003 to July 2013



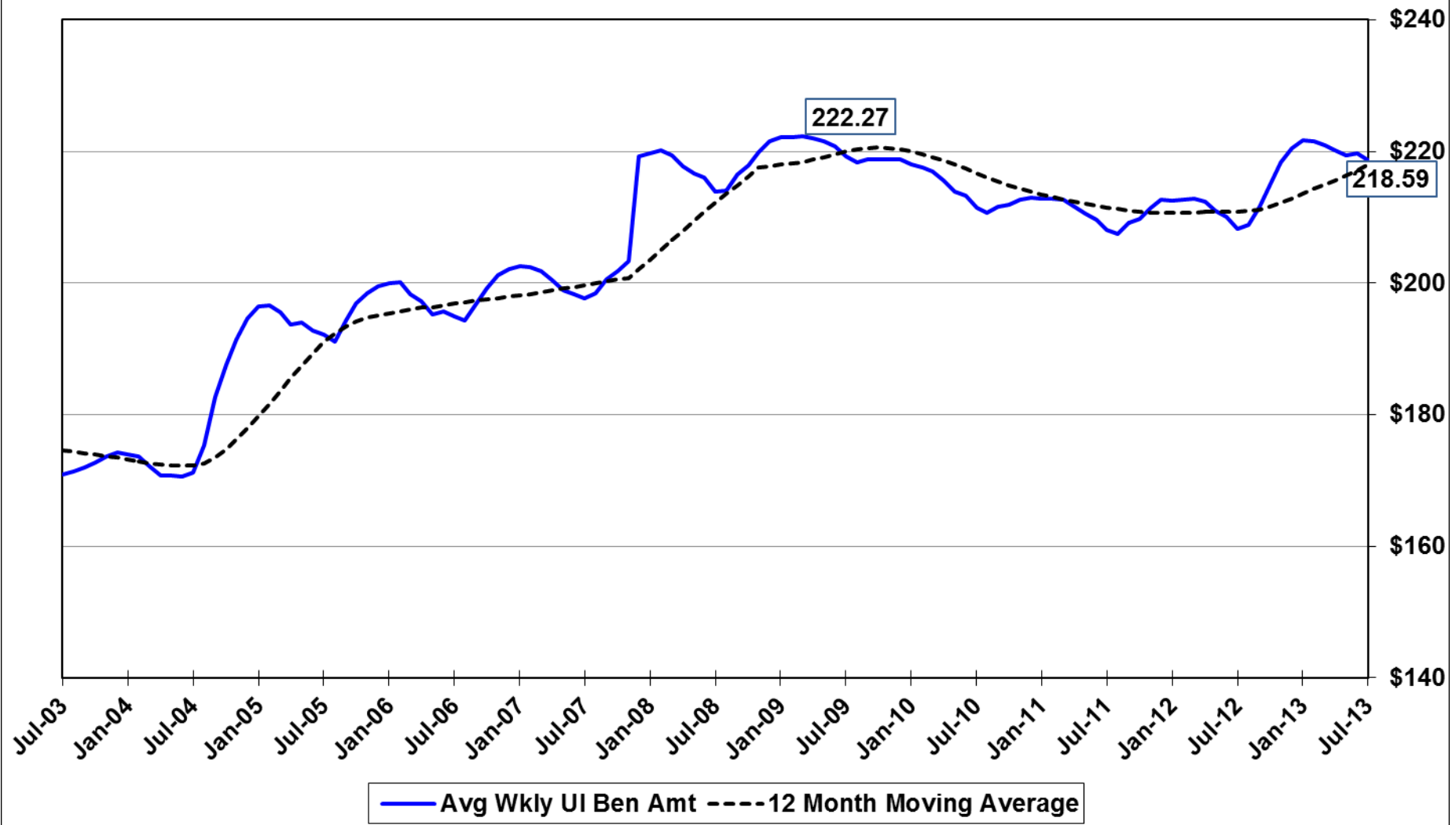
Source: Special report from Arizona Department of Economic Security, Systems and Programming

Additional Claims from July 2003 to July 2013



Source: Calculated from the ETA-5159 report, Claims and Payment Activities, Arizona Department of Economic Security

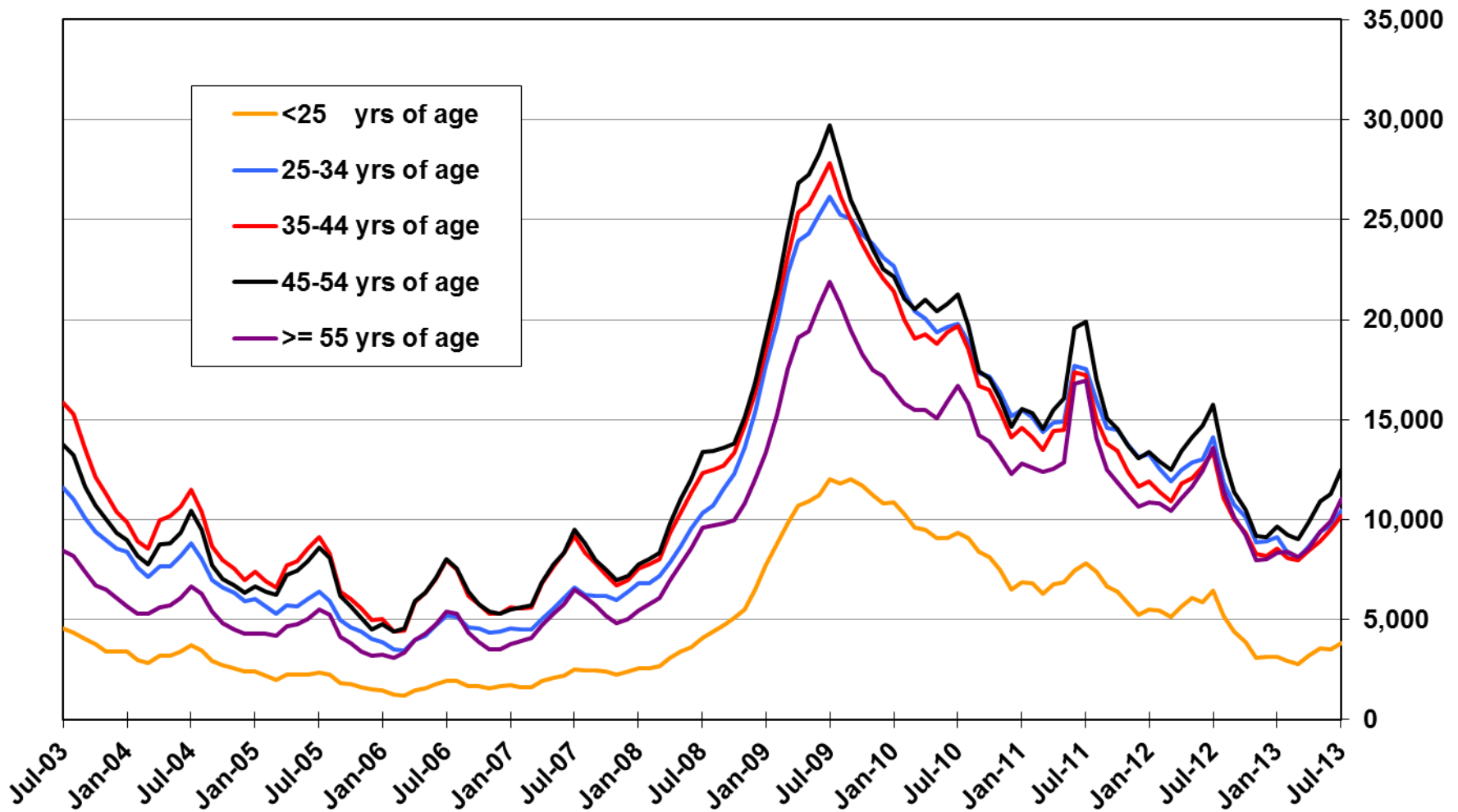
Average Weekly UI Benefit Amount from July 2003 to July 2013



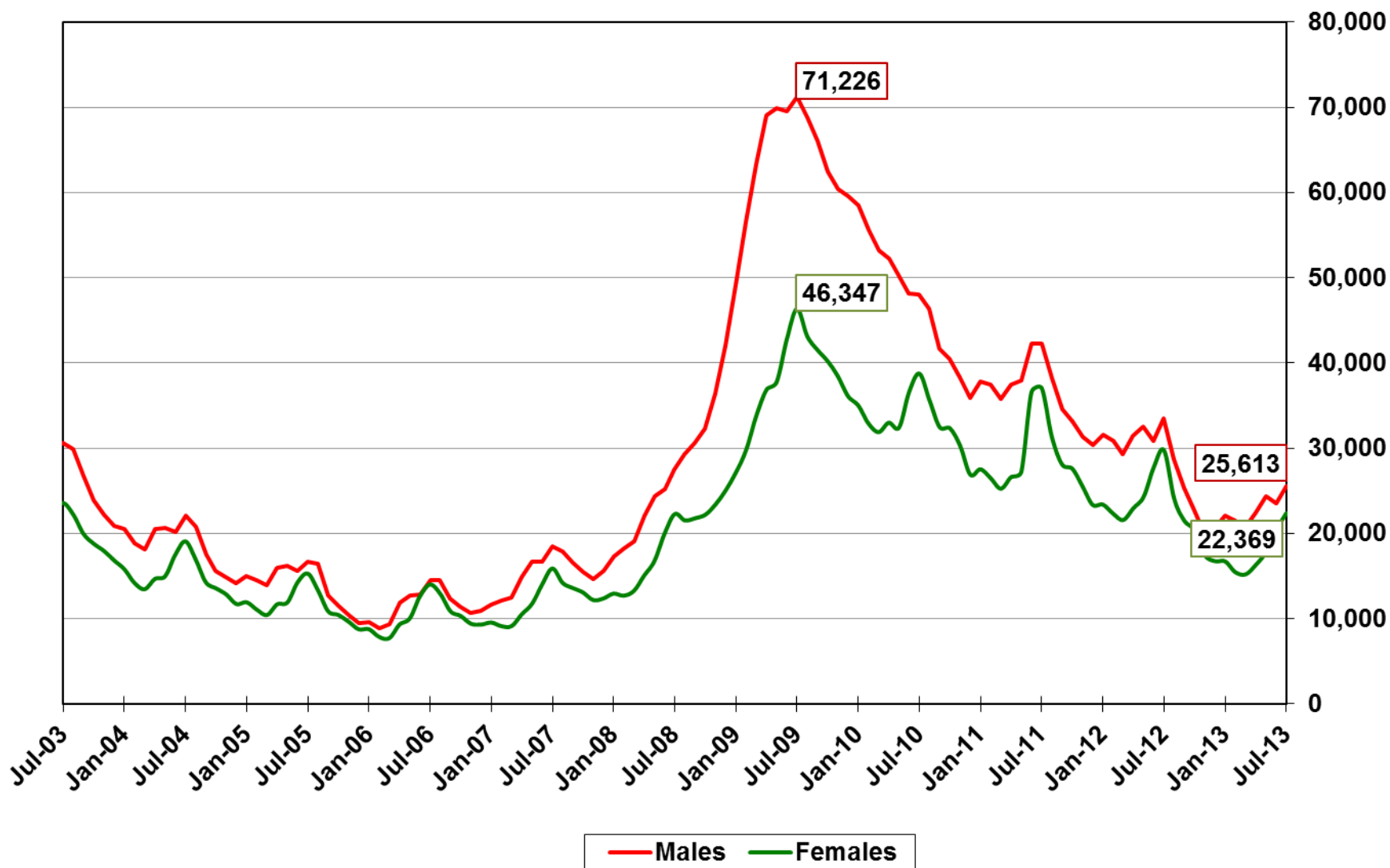
Note: Excludes Federal Additional Compensation amount of \$25

Source : Calculated from the ETA-5159 report, Claims and Payment Activities, Arizona Department of Economic Security

UI Claimants by Age from July 2003 to July 2013



Gender of Claimants from July 2003 to July 2013



Source: ETA-203 Report, Characteristics of the Insured Unemployed, Arizona Department of Economic Security



Impact of Recession on the Labor Market

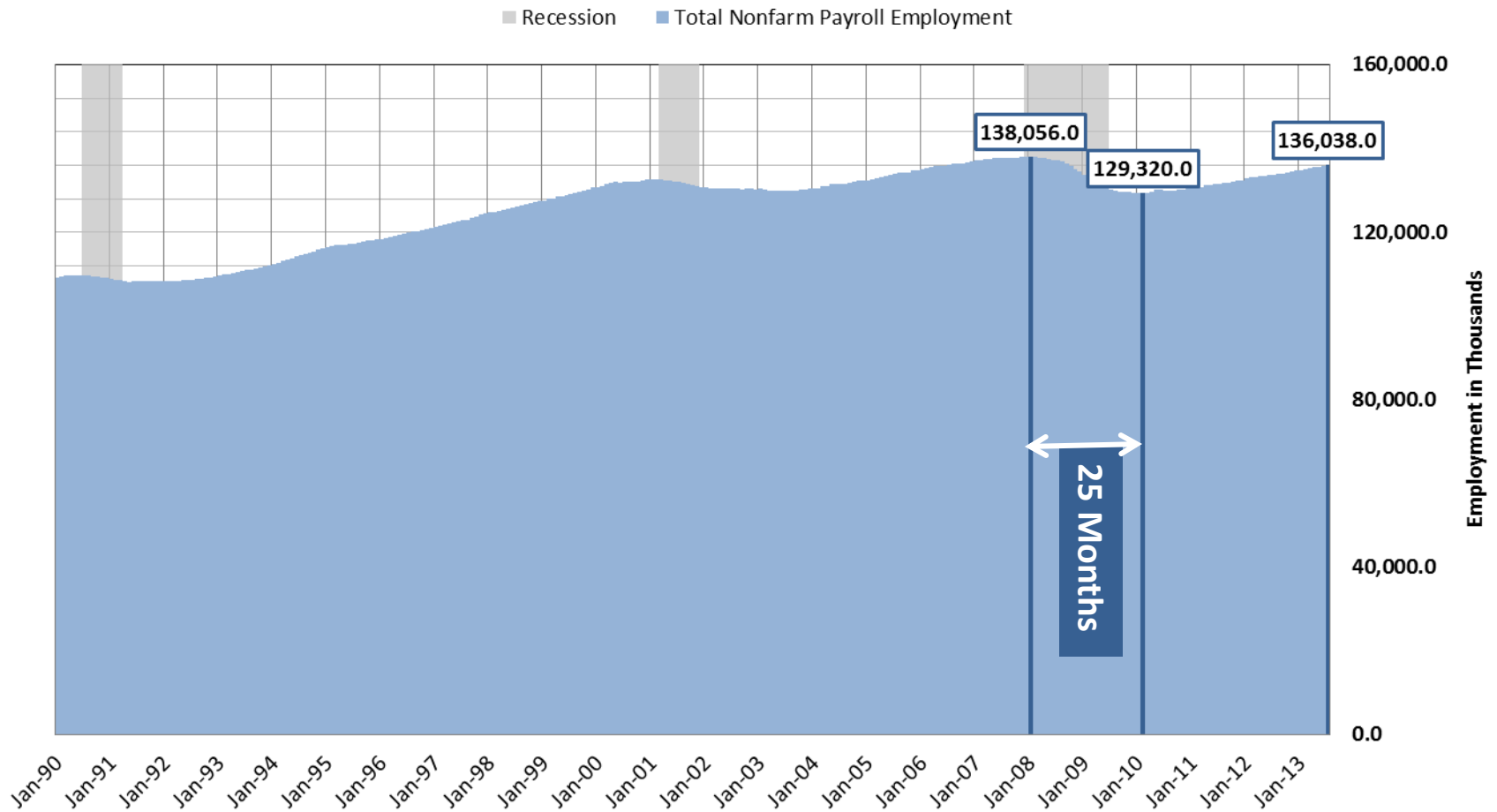
Recession Defined

National Bureau of Economic Research (NBER) defines a recession as:

“a significant decline in economic activity spread across the economy, lasting more than a few months, normally visible in real GDP, real income, employment, industrial production, and wholesale-retail sales”

Business Cycle Dates	
Peak	Trough
July 1990	March 1991
March 2001	November 2001
December 2007	June 2009

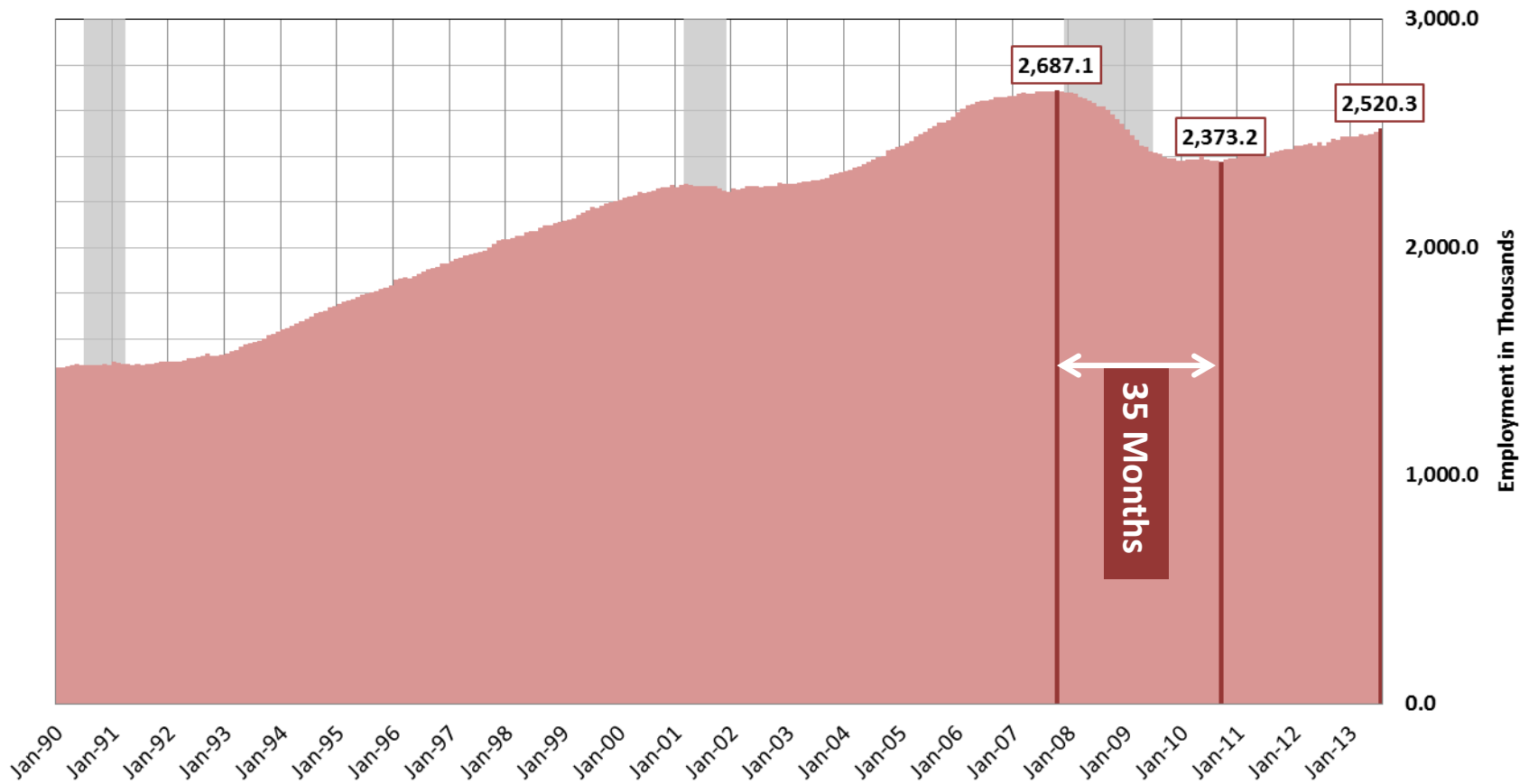
US Total Nonfarm Employment Seasonally Adjusted



- Employment Peak: 138,056,000 jobs (January 2008)
- Employment Trough: 129,320,000 jobs (February 2010)
- Current Employment: 136,038,000 jobs (July 2013)

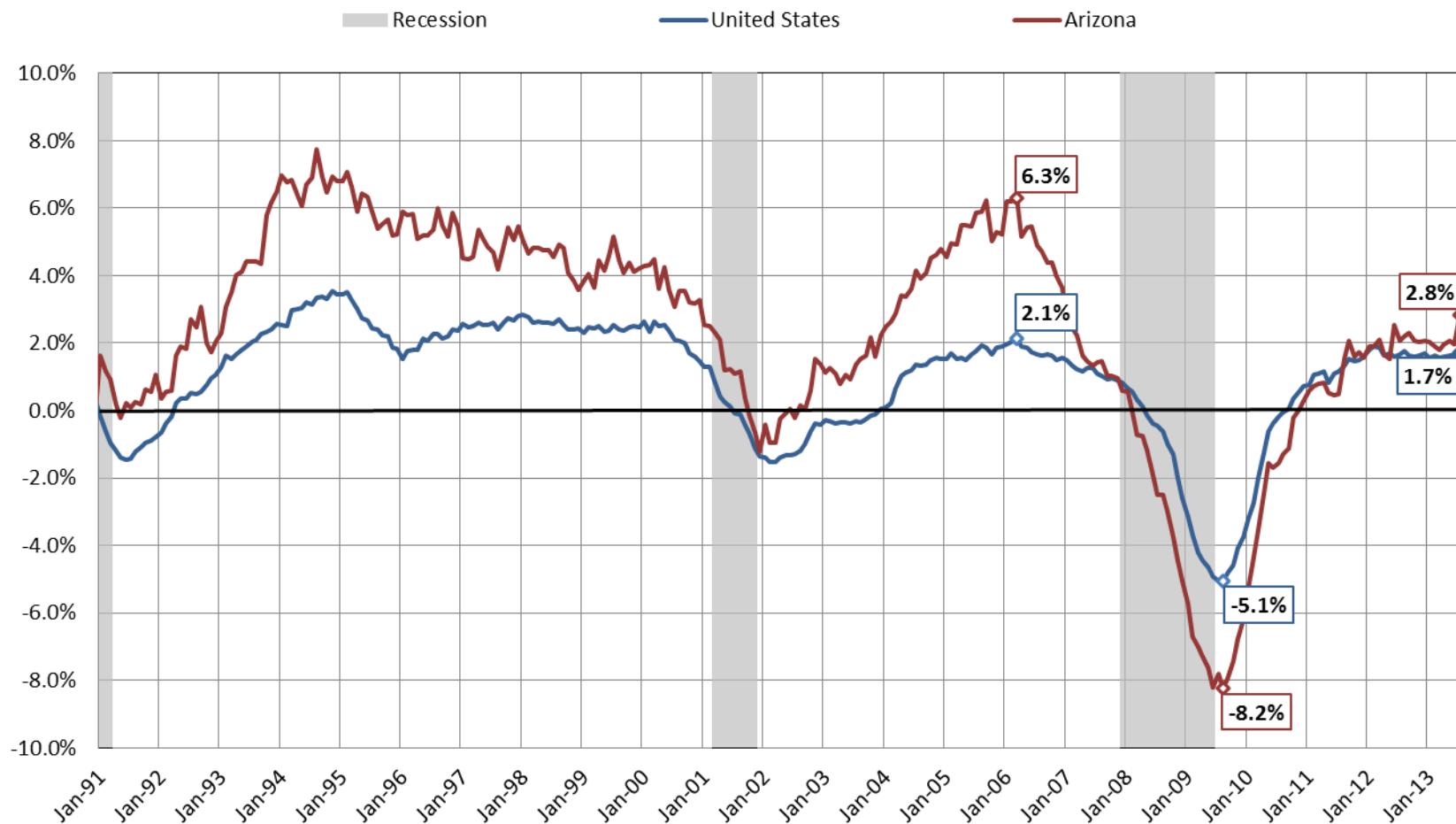
Arizona Industry Employment Seasonally Adjusted

■ Recession ■ Total Nonfarm Payroll Employment



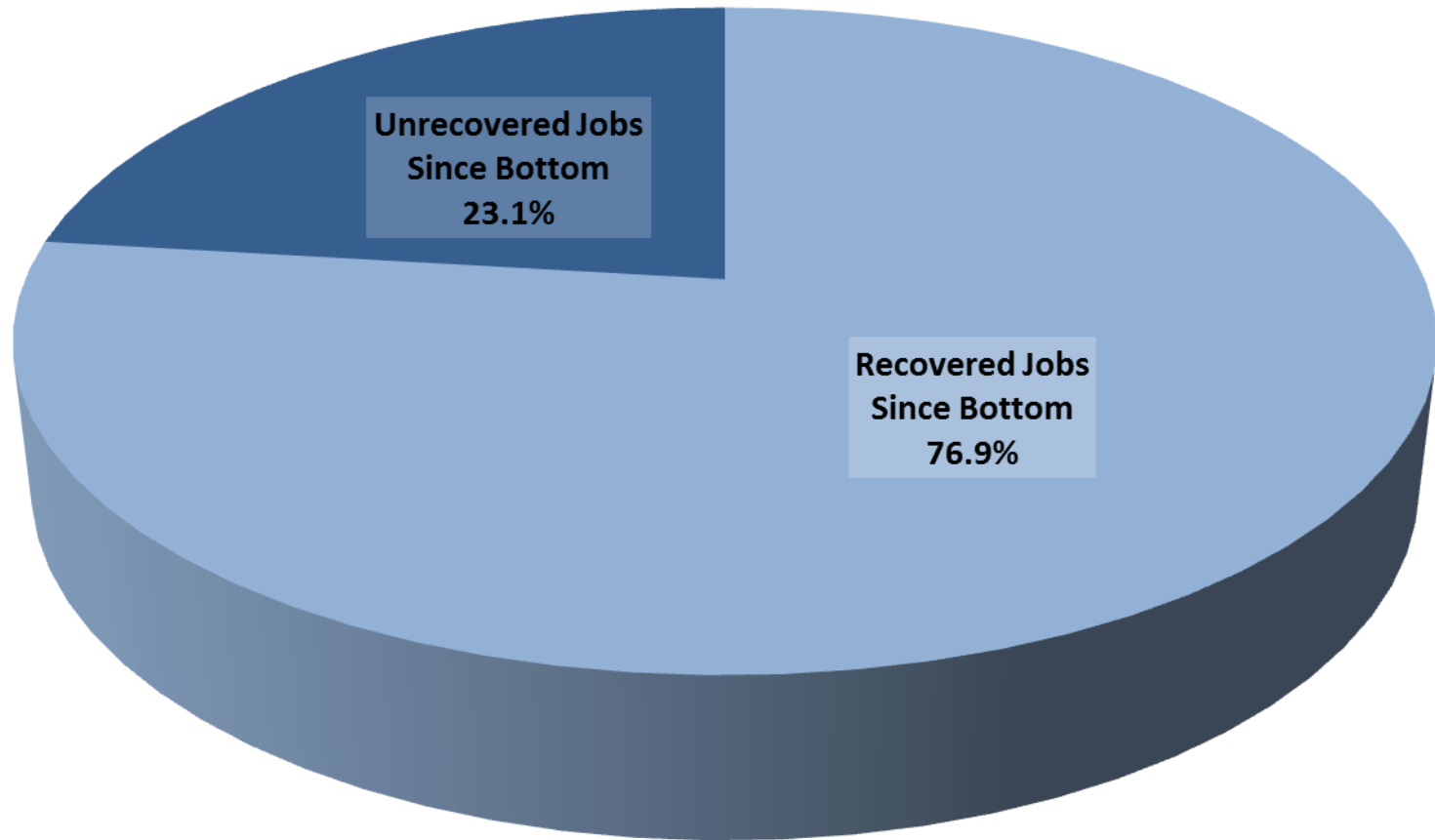
- Employment Peak: 2,687,100 jobs (October 2007)
- Employment Trough: 2,373,200 jobs (September 2010)
- Current Employment: 2,520,300 jobs (July 2013)

Over-the-Year Change in Nonfarm Employment Not Seasonally Adjusted



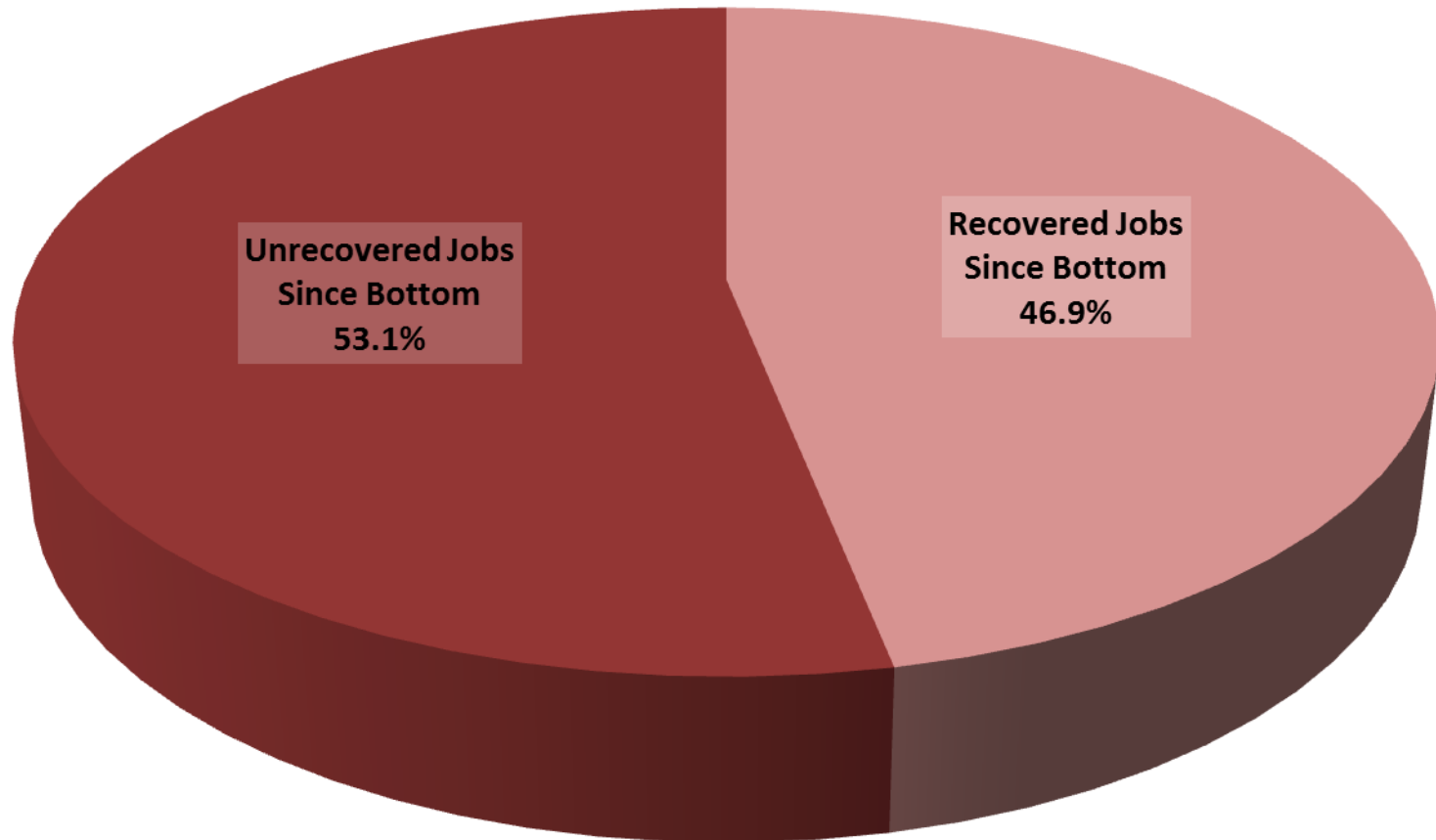
- Growth Rate Peak (March 2006): US: 2.1% vs. Arizona: 6.3%
- Growth Rate Trough (August 2009) : US: -5.1% vs. Arizona: -8.2%
- Current Growth (July 2013): US: 1.7% vs. Arizona: 2.8%

US Nonfarm Job Replacement Rate, Seasonally Adjusted



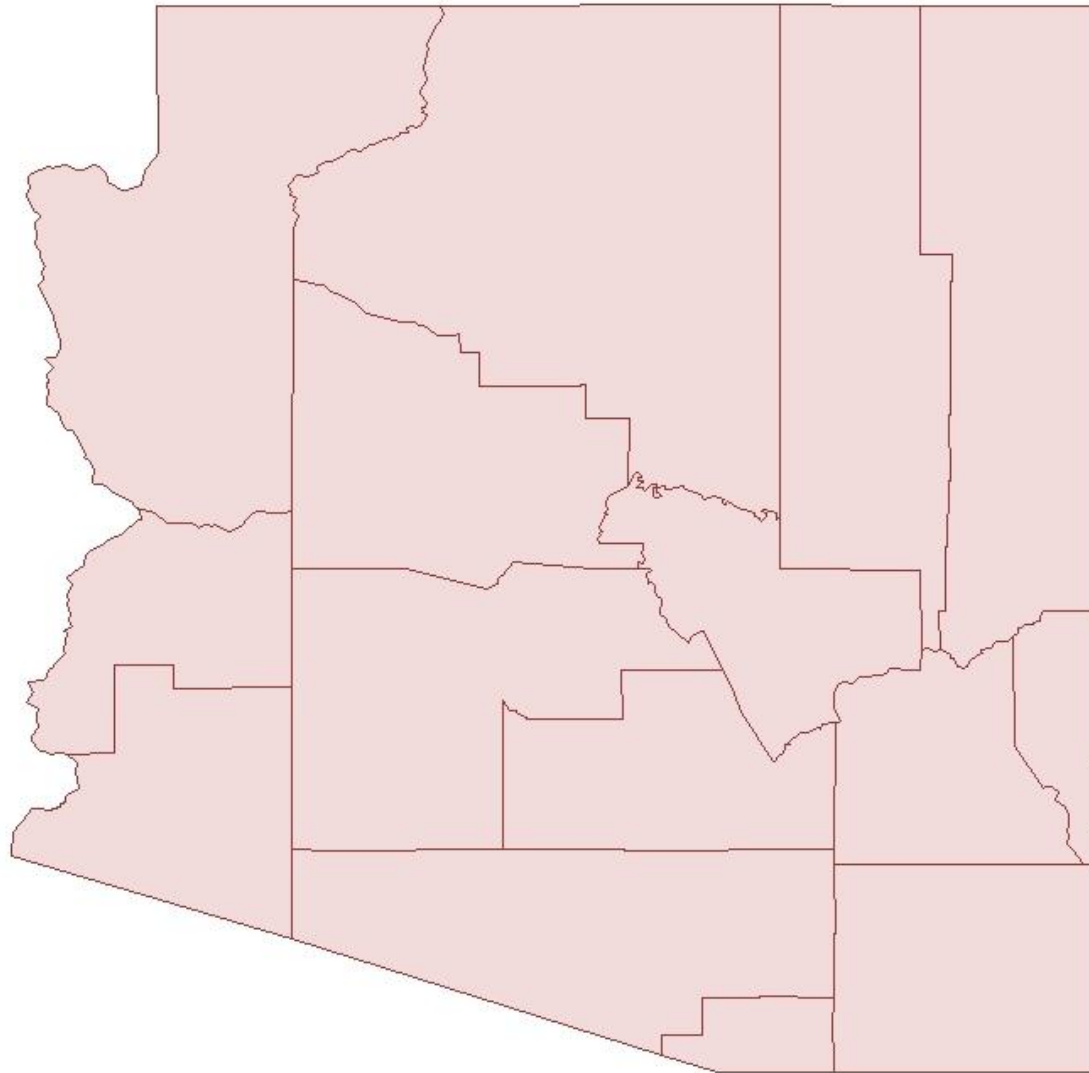
- Net Nonfarm jobs lost from employment peak (January 2008) to trough (February 2010): 8,736,000 jobs (or 6.3%)
- Net Nonfarm jobs recovered from trough (February 2010) to current (July 2013): 6,718,000 jobs (or 5.2%)

Arizona Nonfarm Employment Replacement Rate, Seasonally Adjusted

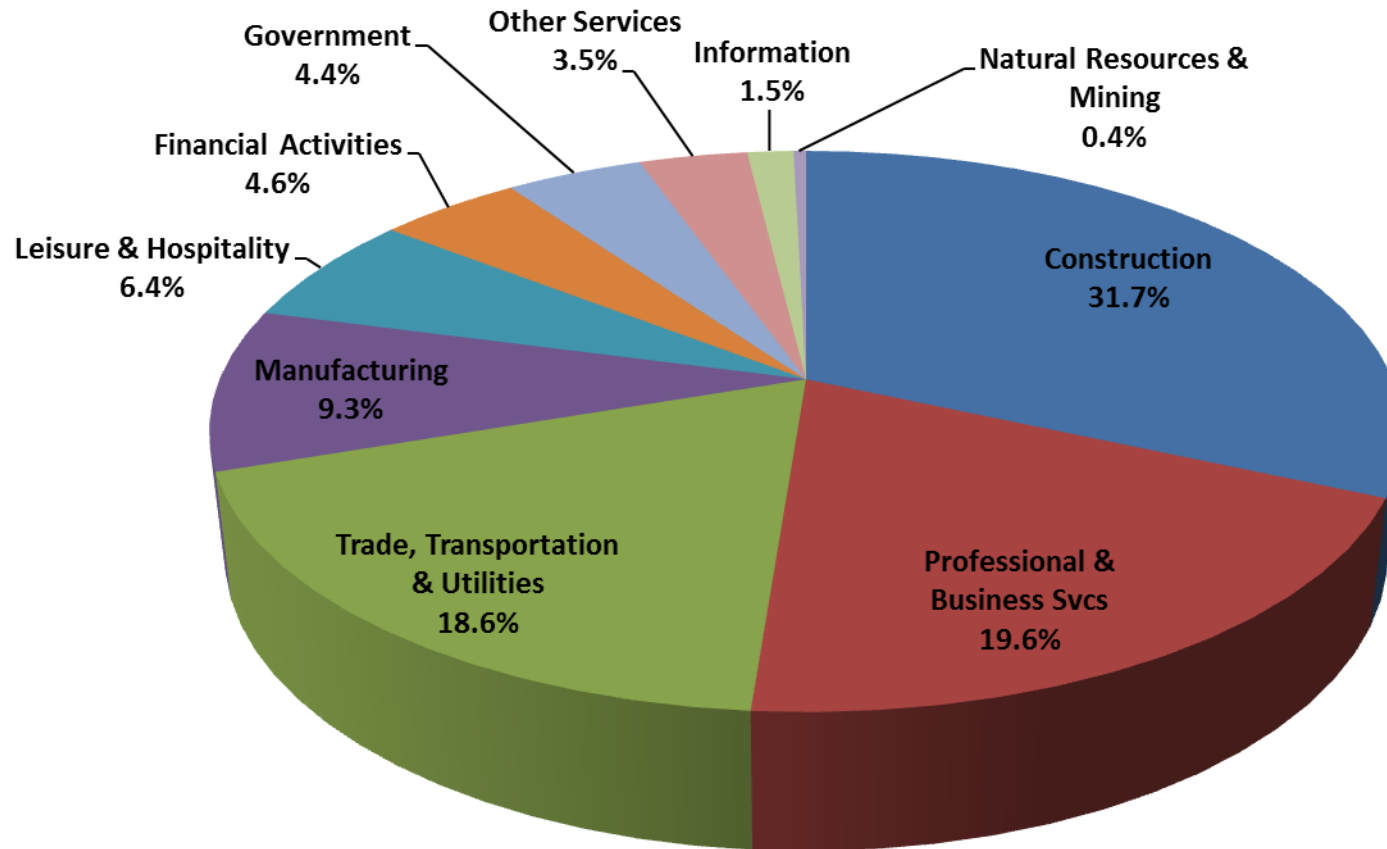


- Net Nonfarm jobs lost from employment peak (October 2007) to trough (September 2010): 313,900 jobs (or 11.7%)
- Net Nonfarm jobs recovered from trough (September 2010) to current (July 2013): 147,100 jobs (or 6.2%)

Where Did the Losses Occur?

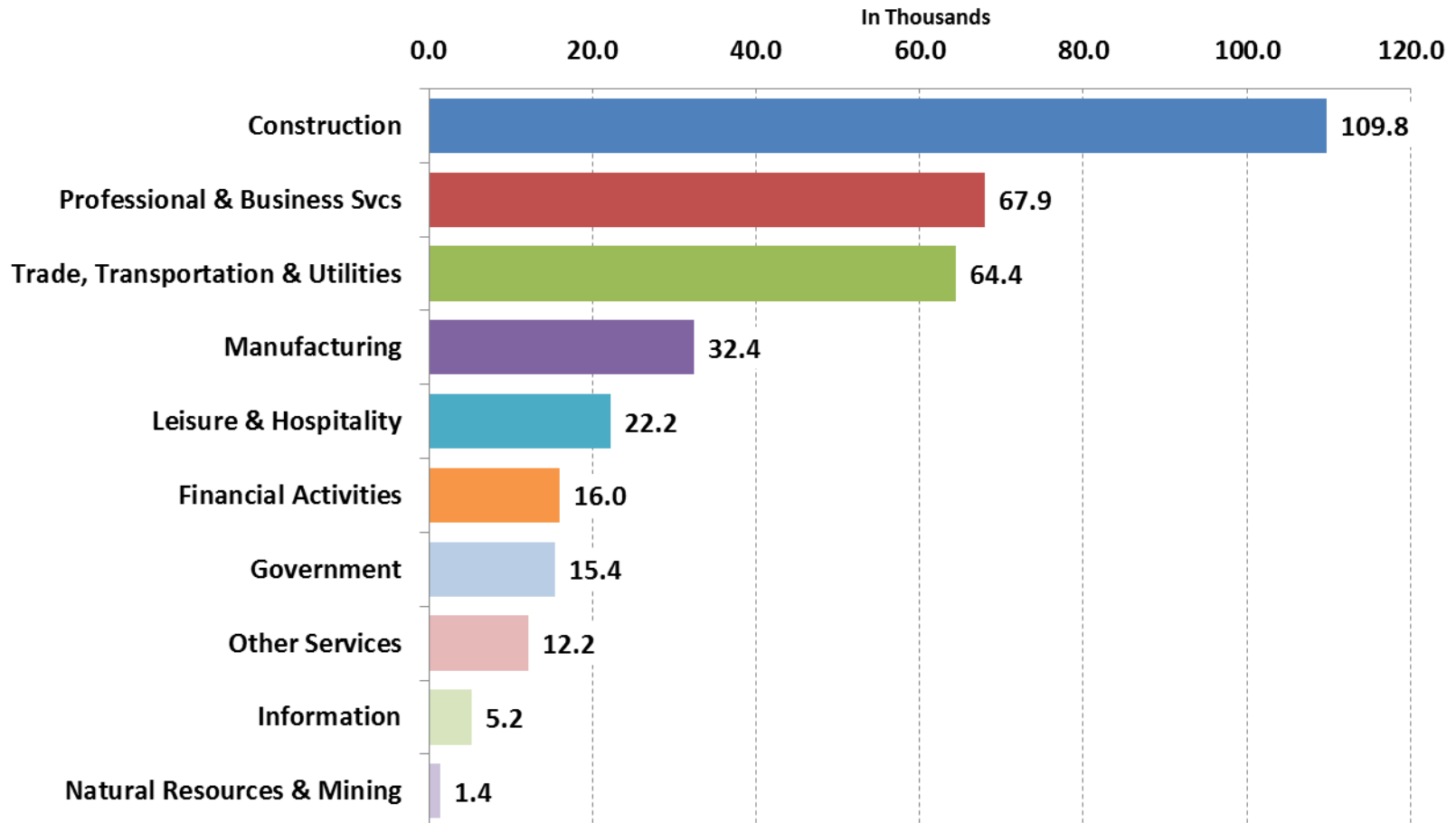


Share of Total Employment Losses From Peak to Trough Seasonally Adjusted



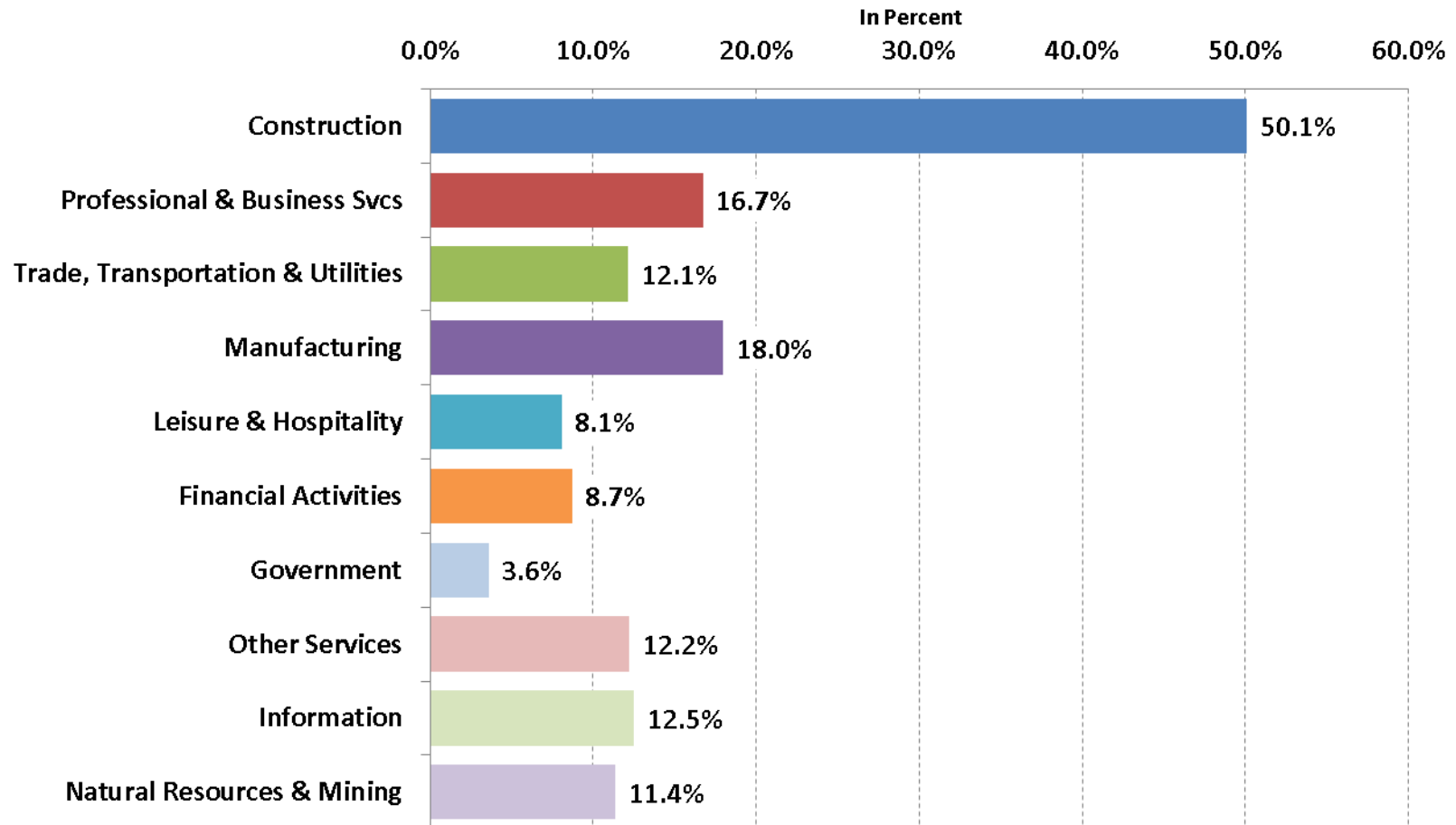
- Nearly 1 in 3 jobs lost from peak (October 2007) to trough (September 2010) were in the Construction Sector
- Losses in Construction, Professional & Business Services, and Trade Transportation & Utilities account for 69.8% of all losses

Employment Losses From Peak to Trough by Industry Seasonally Adjusted



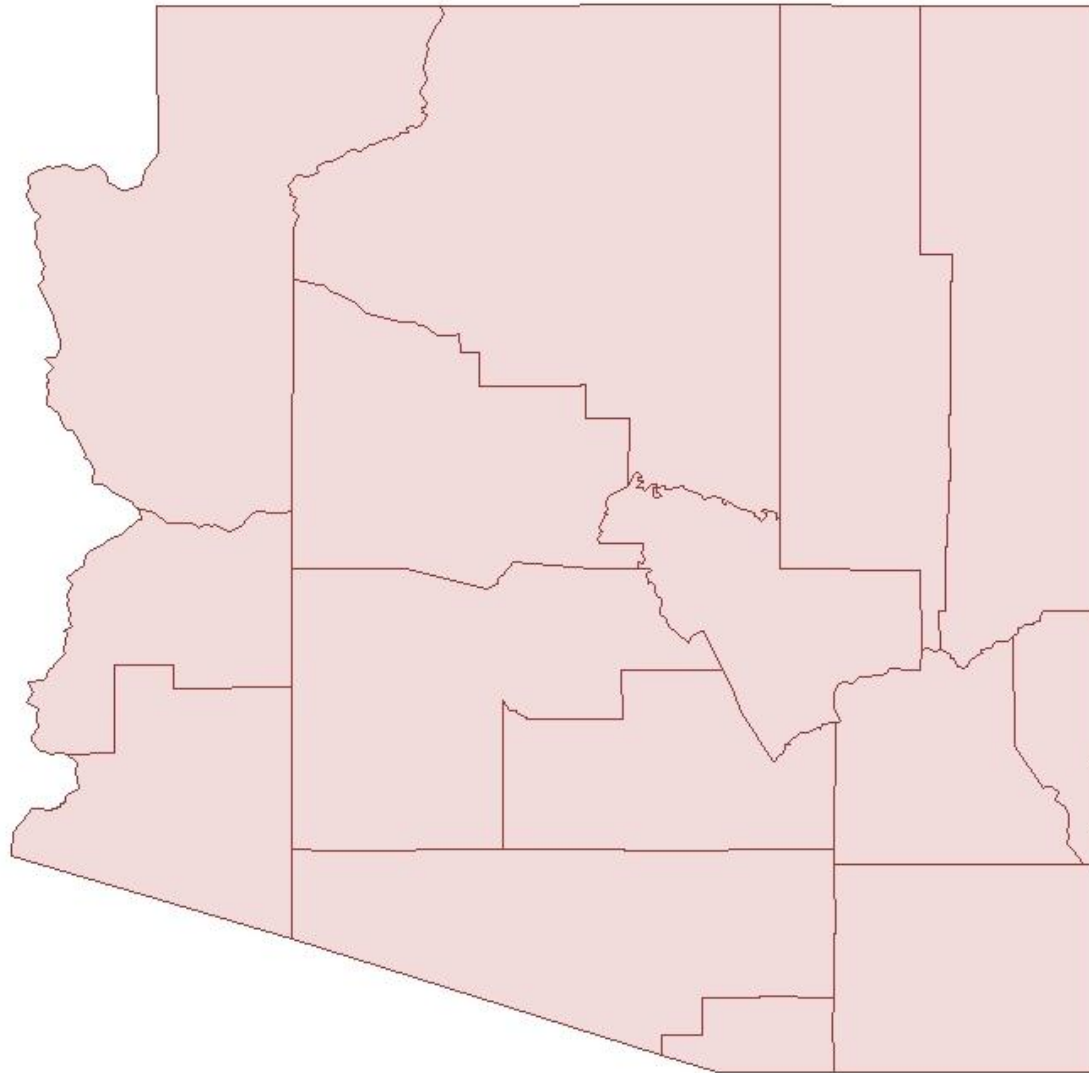
- Total Sector Job losses from peak (October 2007) to trough (September 2010): 346,900 jobs
- Education & Health Services was the only sector to grow through the recession adding 33,000 jobs from October 2007 to September 2010

Employment Losses From Peak to Trough by Industry Seasonally Adjusted

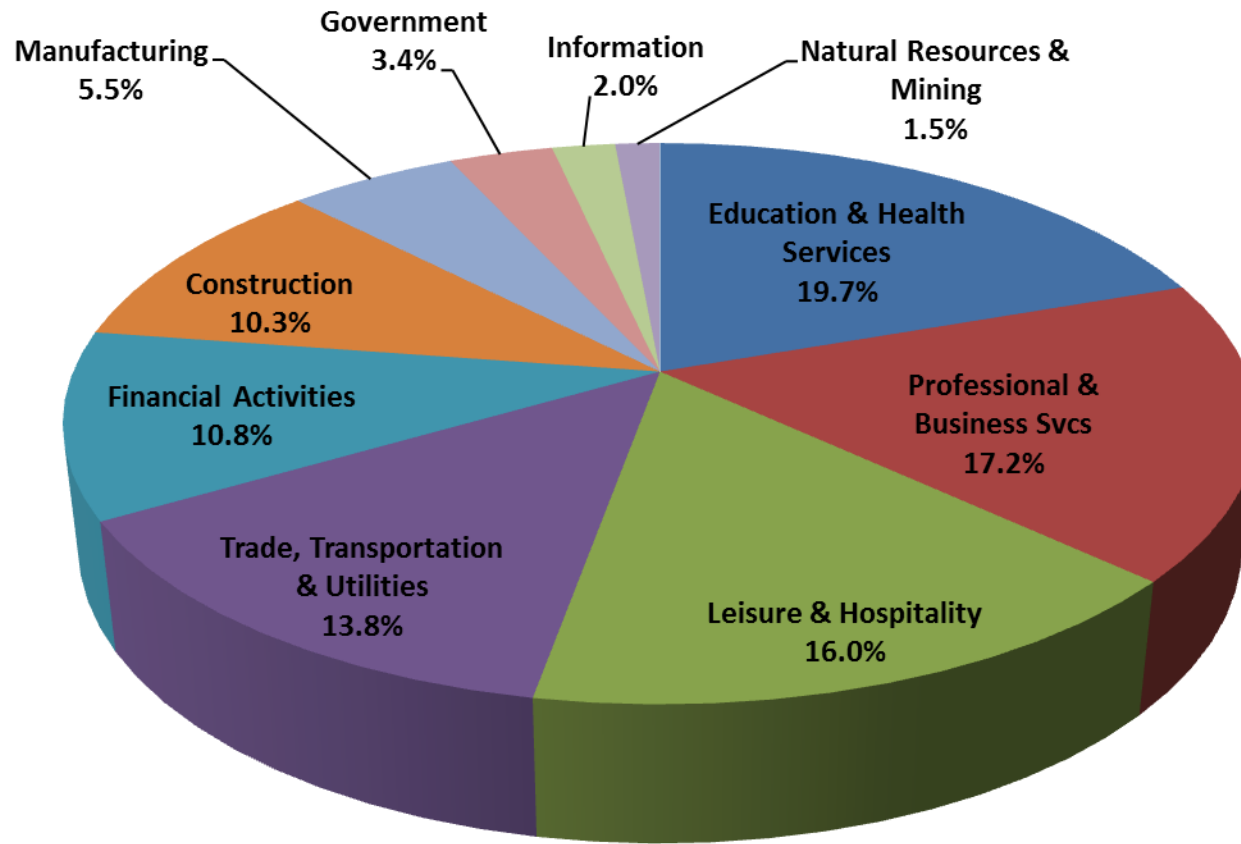


- Construction shed more than half of its jobs (50.1% or 109,800 jobs) from October 2007 to September 2010
- Government experienced the smallest percentage loss reporting a 3.6% loss from October 2007 to September 2010

Where Are the Gains Occurring?

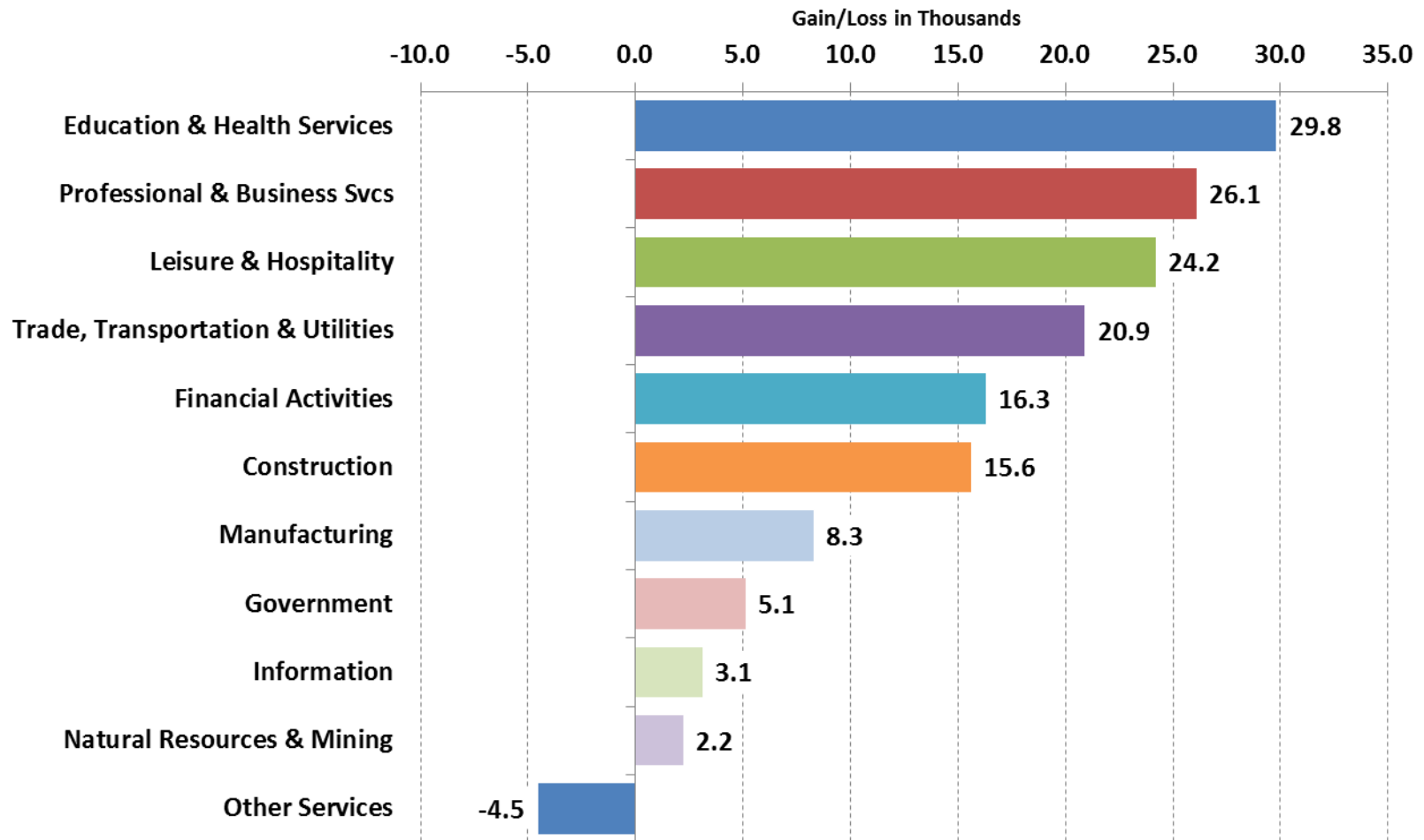


Share of Total Employment Gains From Trough to Present Seasonally Adjusted



- A majority of the gains occurred in Education & Health Services, Professional & Business Services,, and Leisure and Hospitality (52.9%)
- Other Services additional jobs since the trough (September 2010)

Employment Gain/Loss From Trough to Present by Industry Seasonally Adjusted

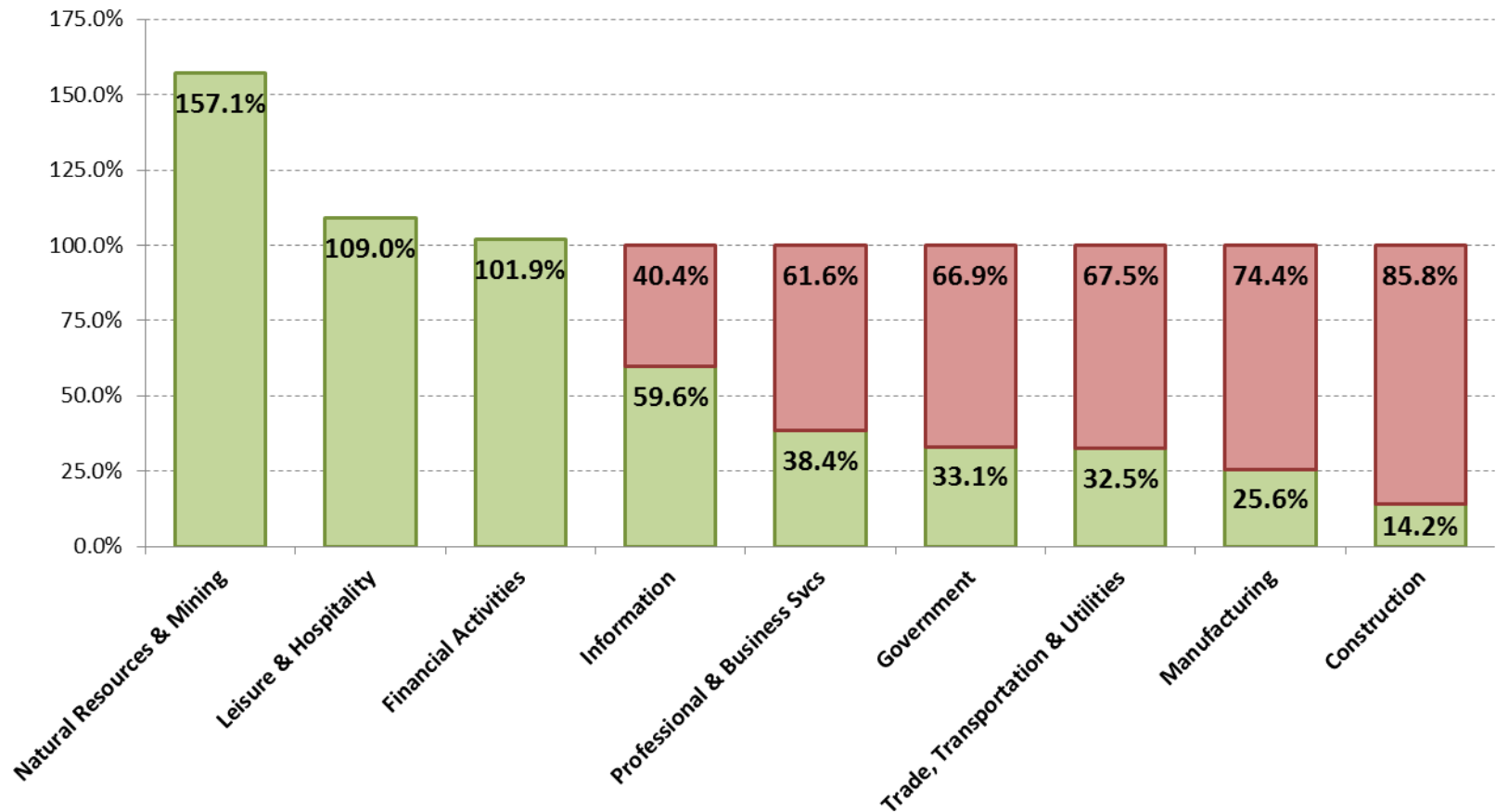


- Total Sector job gains from trough (September 2010) to present(July 2013): 151,600 jobs
- Total Sector job losses from trough (September 2010) to present (July 2013): -4,500 jobs

Replacement Rate by Sector

Seasonally Adjusted

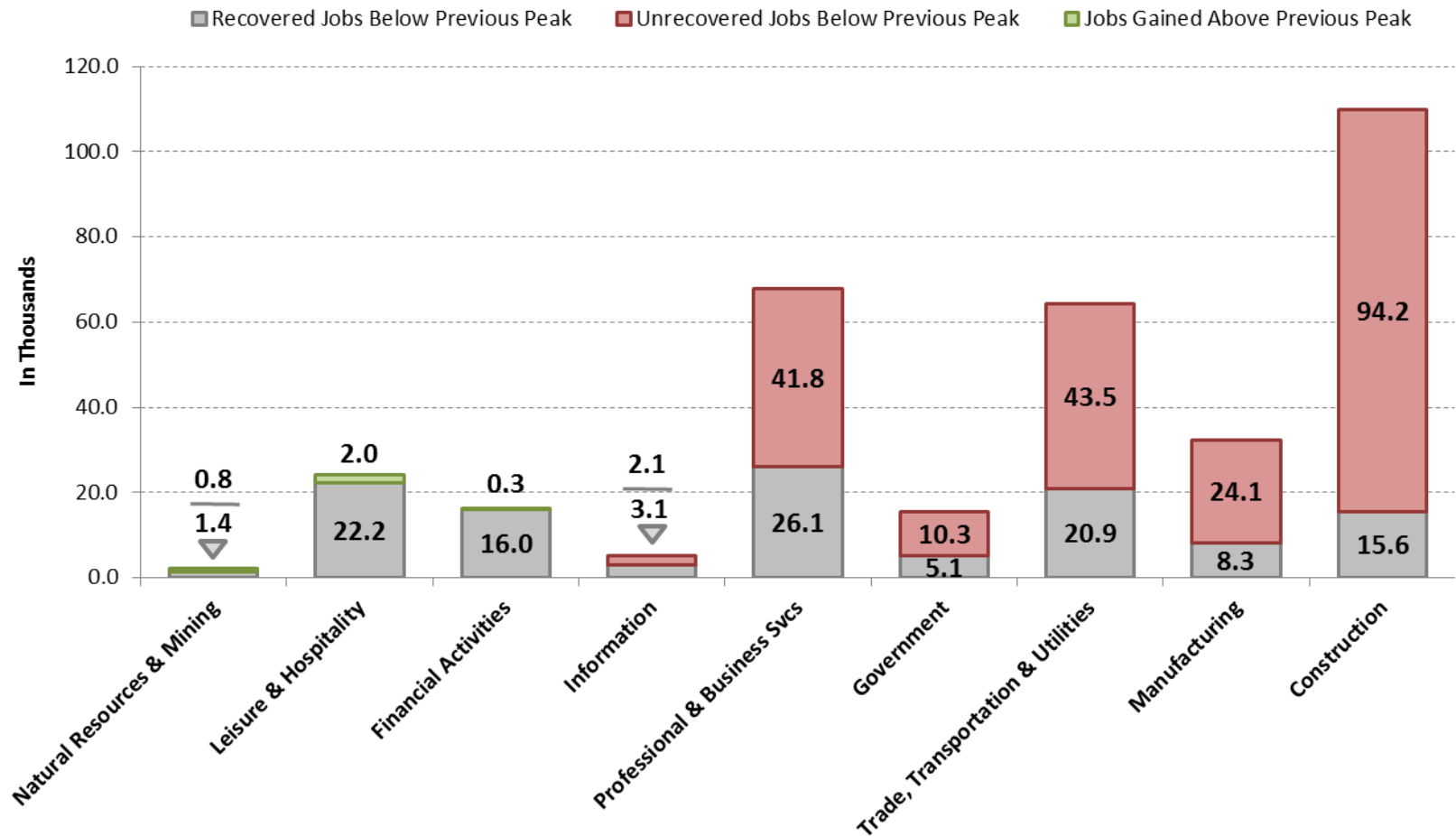
Recovered Jobs Since Trough Unrecovered Jobs Since Trough



- When replacement rate equals 100%, all jobs lost from peak (October 2007) to trough (September 2010) have been regained
- Three sectors have recovered all jobs lost, six sectors have recovered only a portion of jobs lost from the peak (October 2007) to trough (September 2010)

Employment Replacement by Sector

Seasonally Adjusted

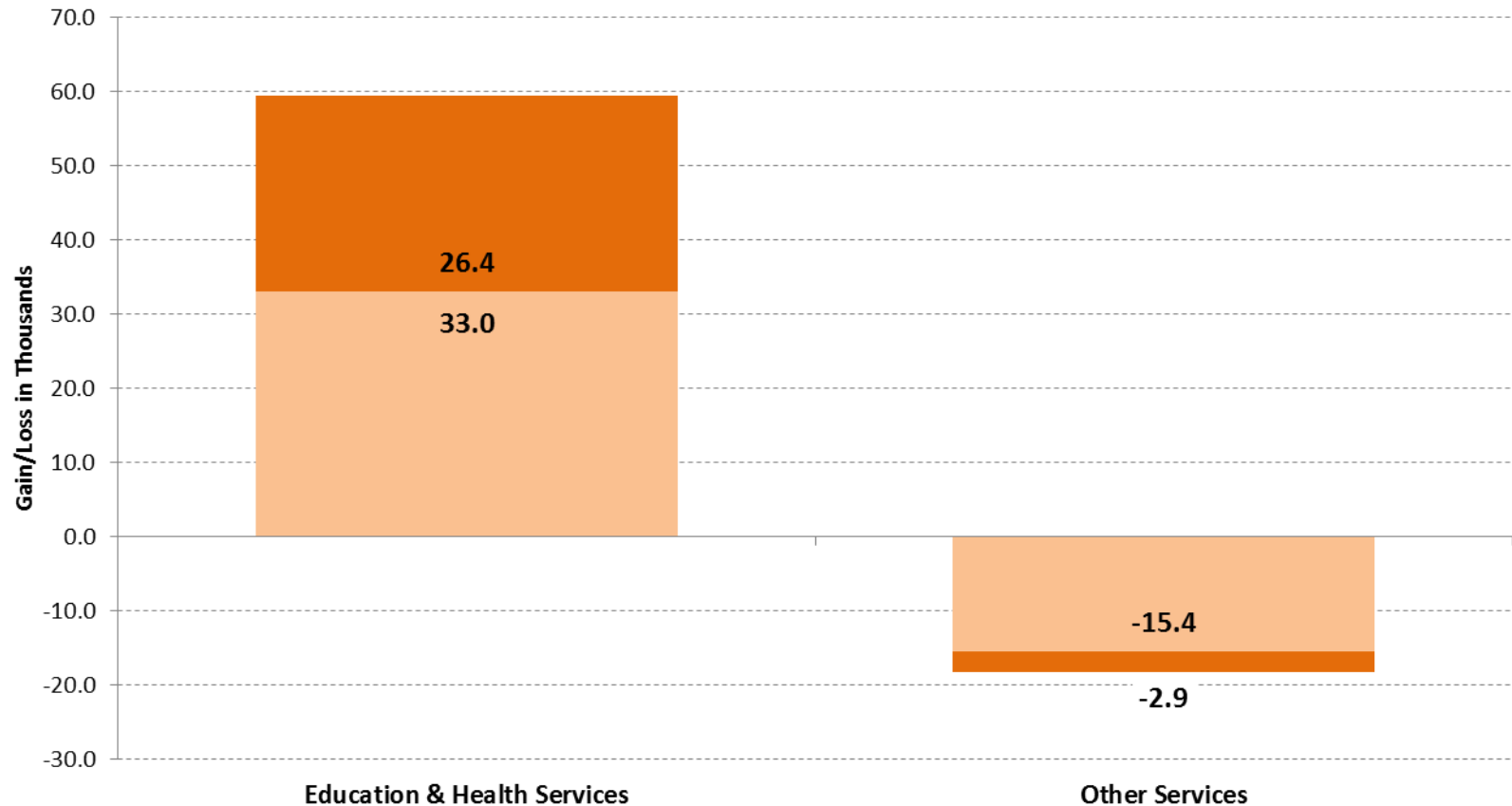


- Despite regaining the most jobs (26,100 jobs), Professional & Business Services still have 41,800 unrecovered jobs
- Construction has the most unrecovered jobs among all sectors with 94,200 jobs

Job Gain/Lost From Peak to Present by Sector

Seasonally Adjusted

Job Gain/Lost from Peak to Trough Job Gain/Loss from Trough to Present



- Education & Health Services grew through the recession adding a total of 59,400
- Other Services initially lost 15,400 jobs and since September 2010 lost an additional 2,900 jobs

A light blue map of Washington state is centered in the background. A dark blue horizontal banner is superimposed across the middle of the map, containing the title text.

Labor Force Overview

Labor Force Concepts

- **Civilian Noninstitutional Population (CNIP):** Everyone ages 16 and older who is not on active duty in the Armed Forces or residing in prisons or homes for the aged
- **Labor Force** consists of people who are active in the labor market; either as employed workers or as unemployed job seekers
- **Labor Force Participation Rate (LFPR):** The labor force as a percent of civilian noninstitutional population

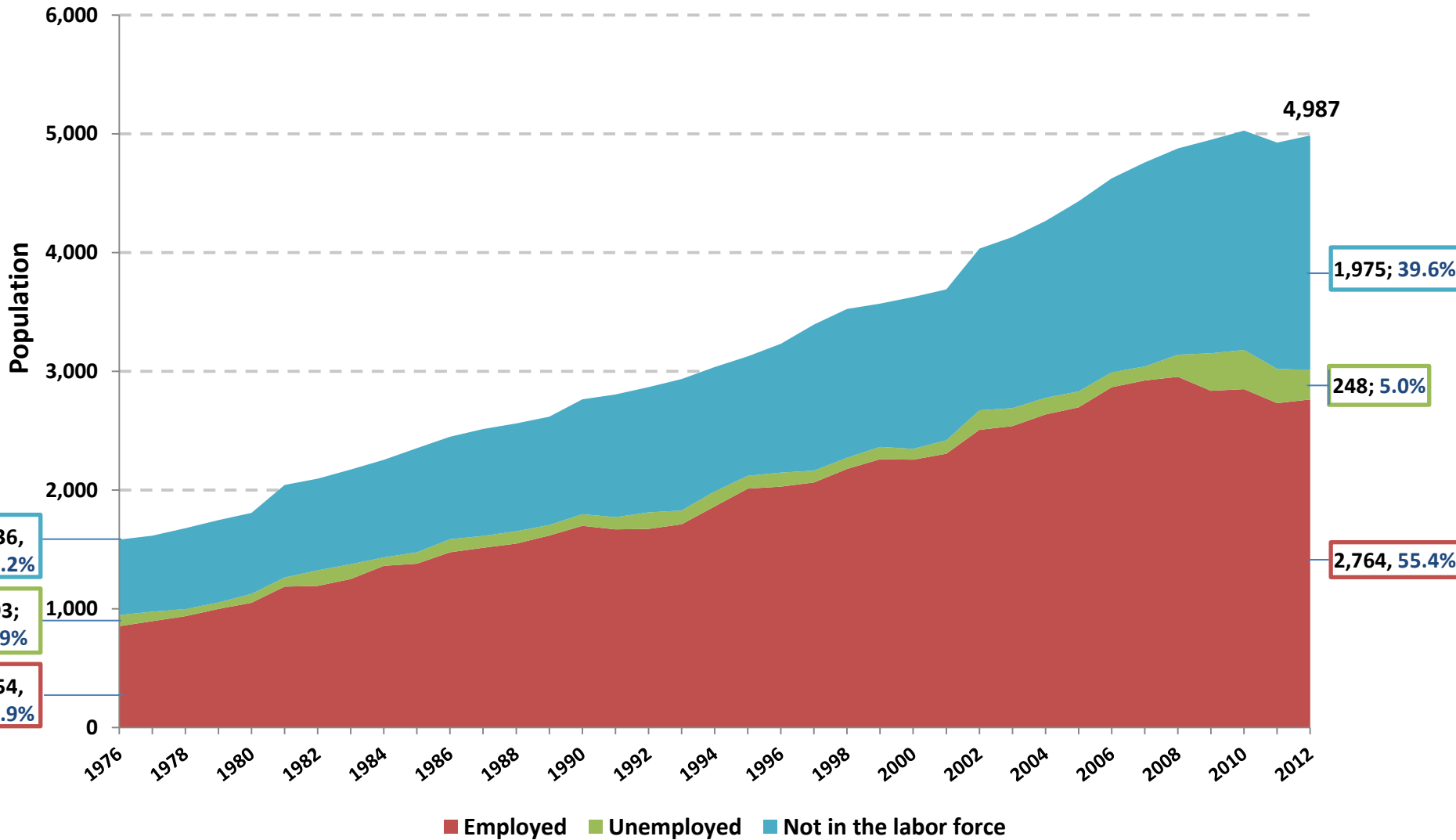
Arizona 2012 example

$$LFPR = \frac{\text{Labor Force}}{CNIP}$$

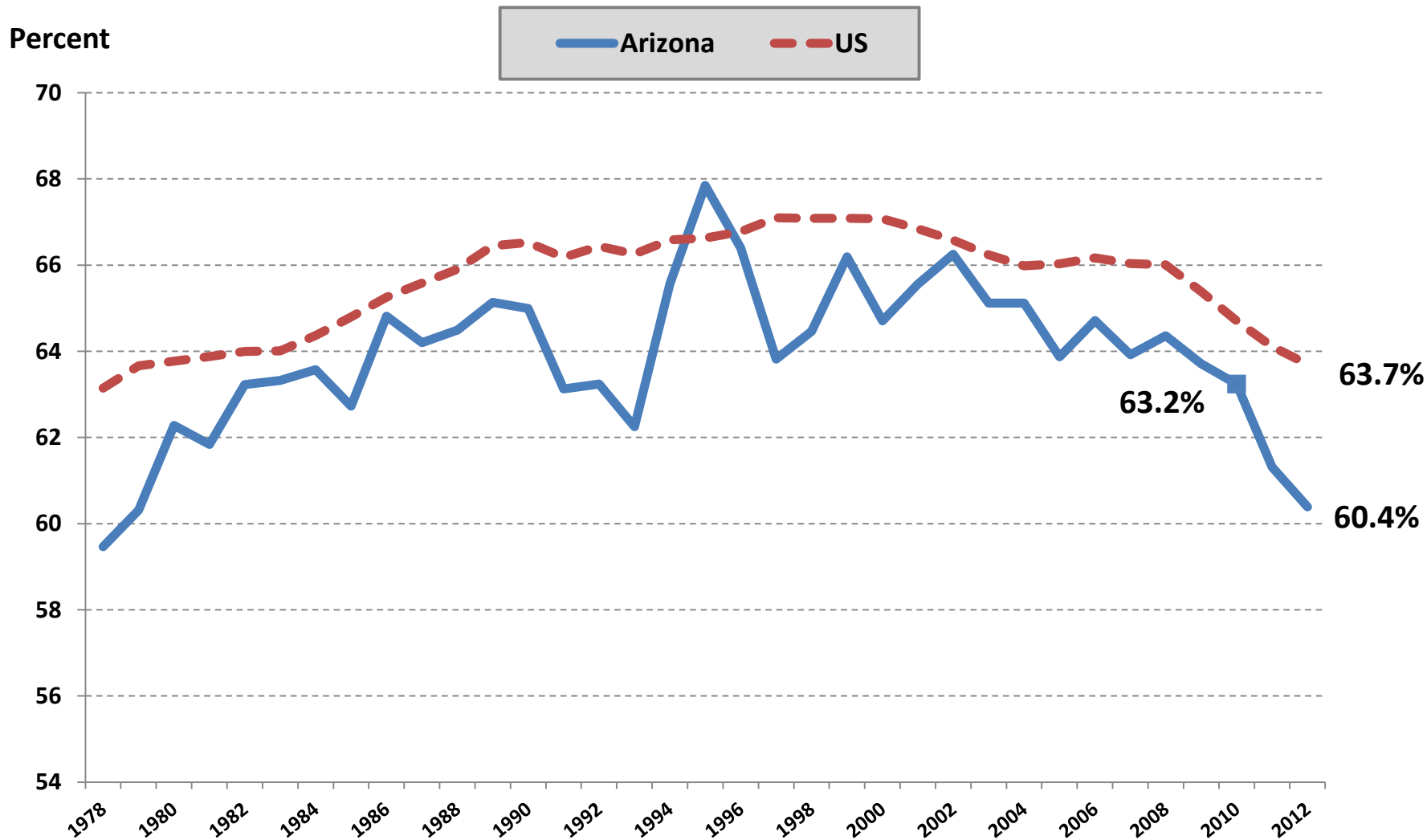
$$60.4\% = \frac{(2,764,000 + 248,000)}{4,987,000}$$

Civilian Noninstitutional Population by Employment Status, Arizona, Not Seasonally Adjusted, 1976-2012

(In Thousands)

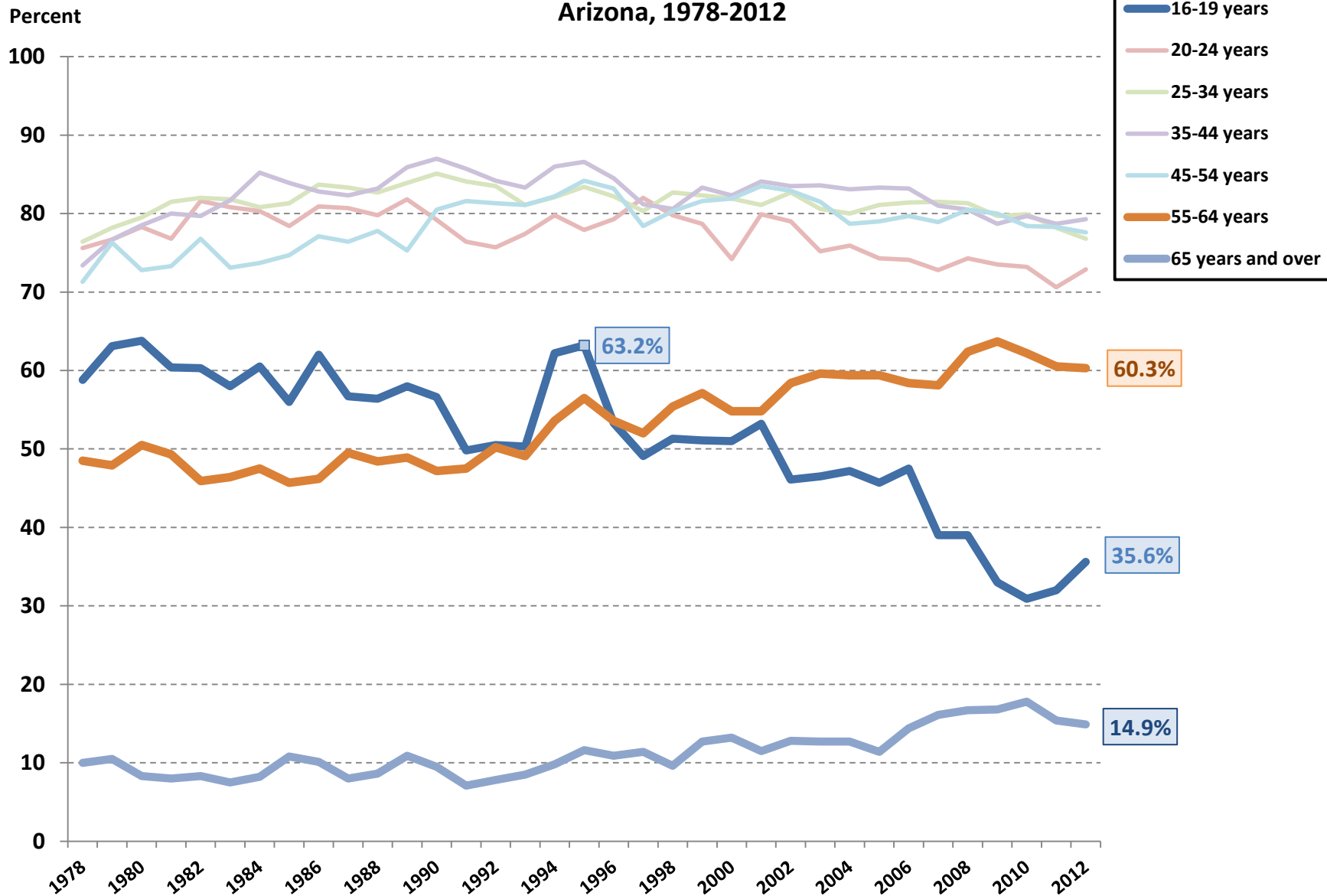


Labor Force Participation Rate 1978-2012



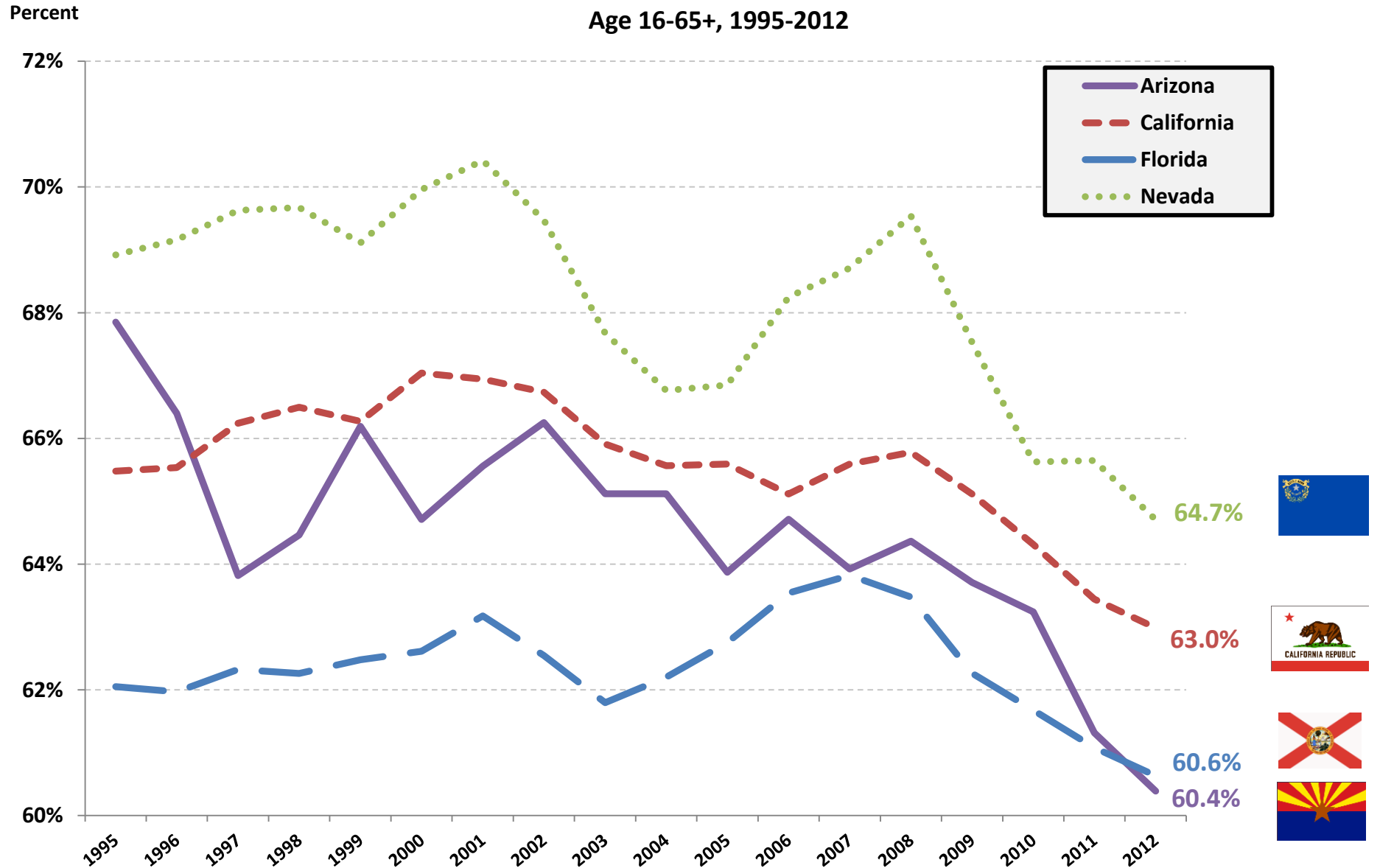
Labor Force Participation Rate by Age Group

Arizona, 1978-2012

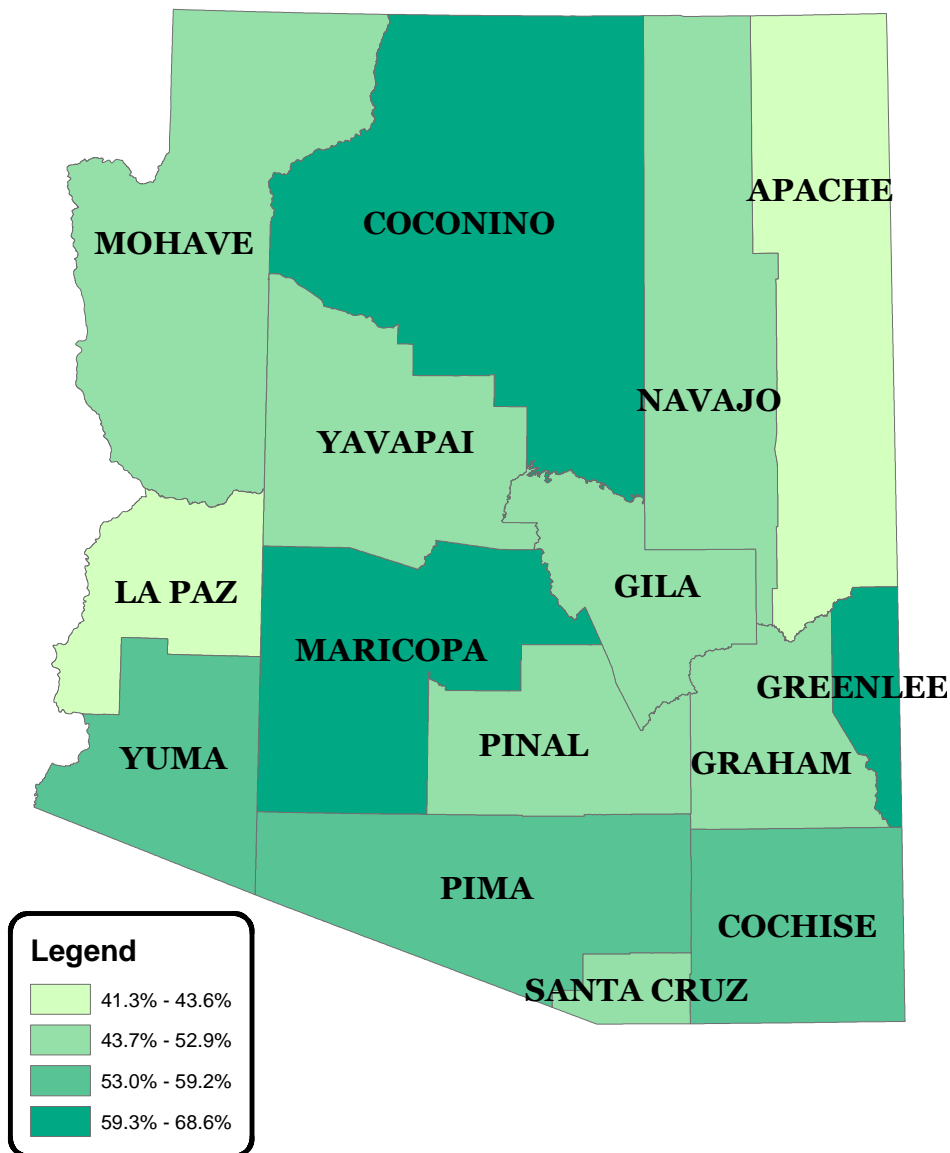


Labor Force Participation Rate

Age 16-65+, 1995-2012

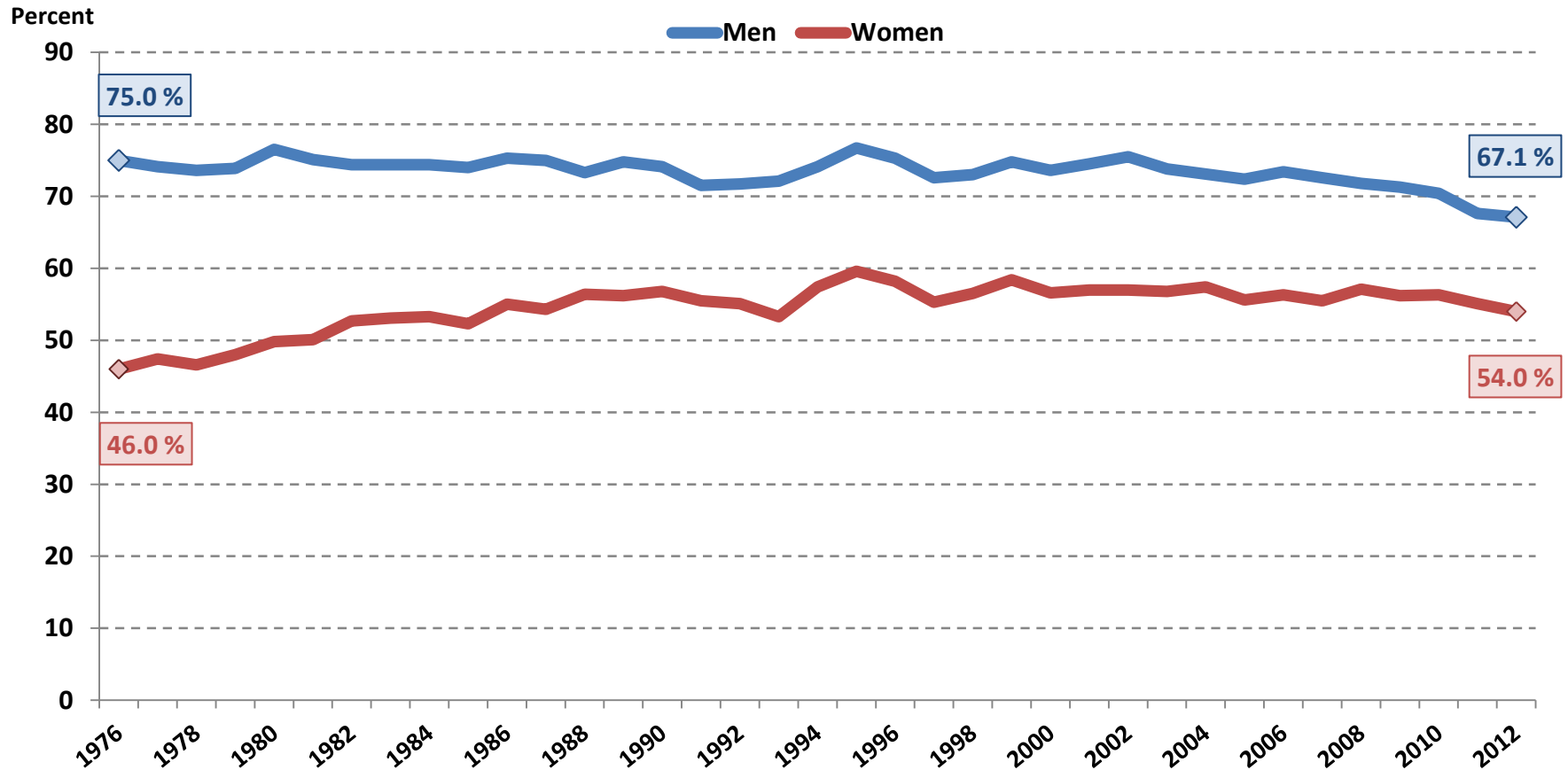


County Labor Force Participation Rates Arizona, 2012



Labor Force Participation Rates by Gender

Arizona, 1976-1978

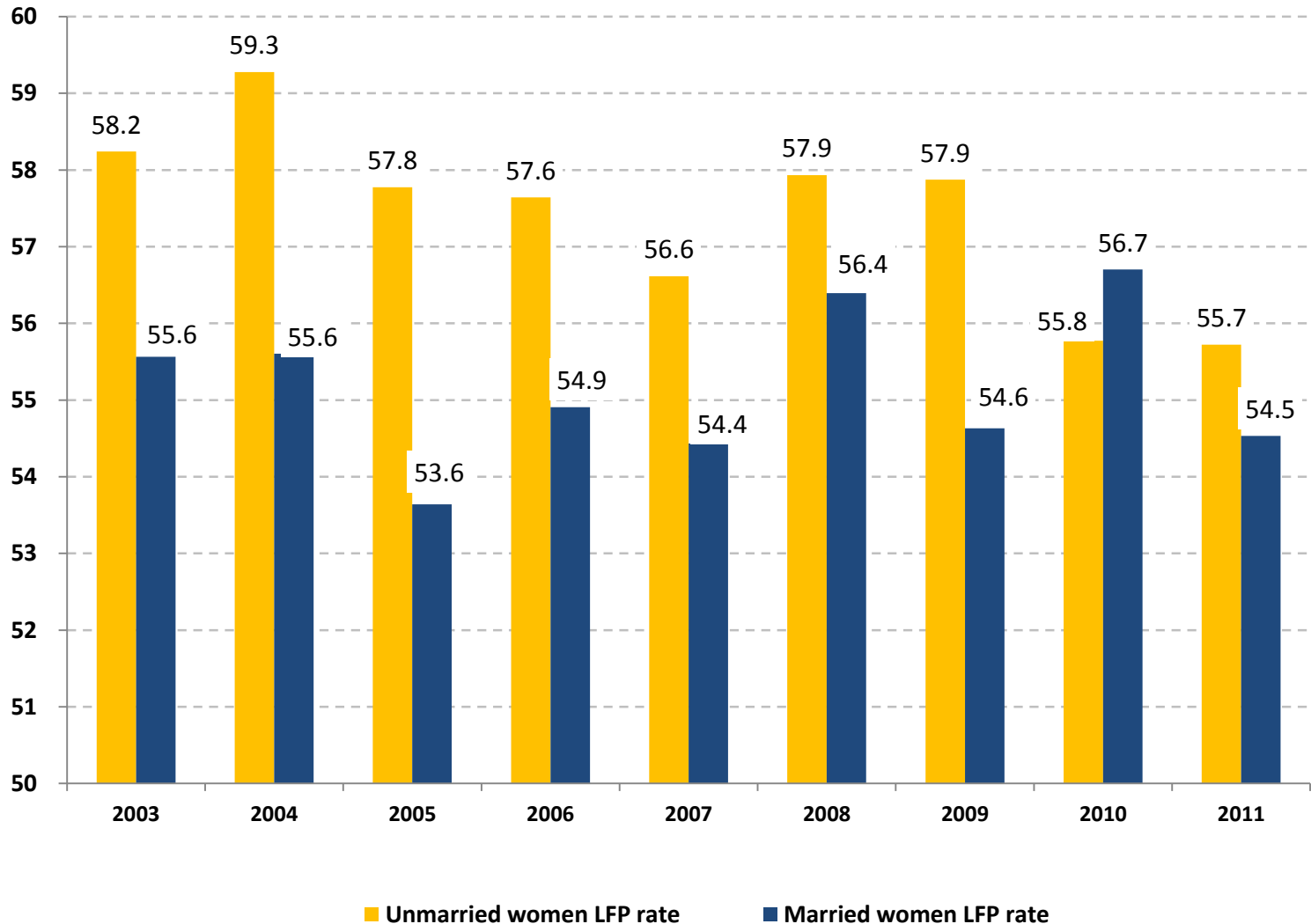


The LFPR Gap Between Sexes
Has Been Shrinking

Labor Force Participation Rate

Unmarried Women vs Married Women, Arizona

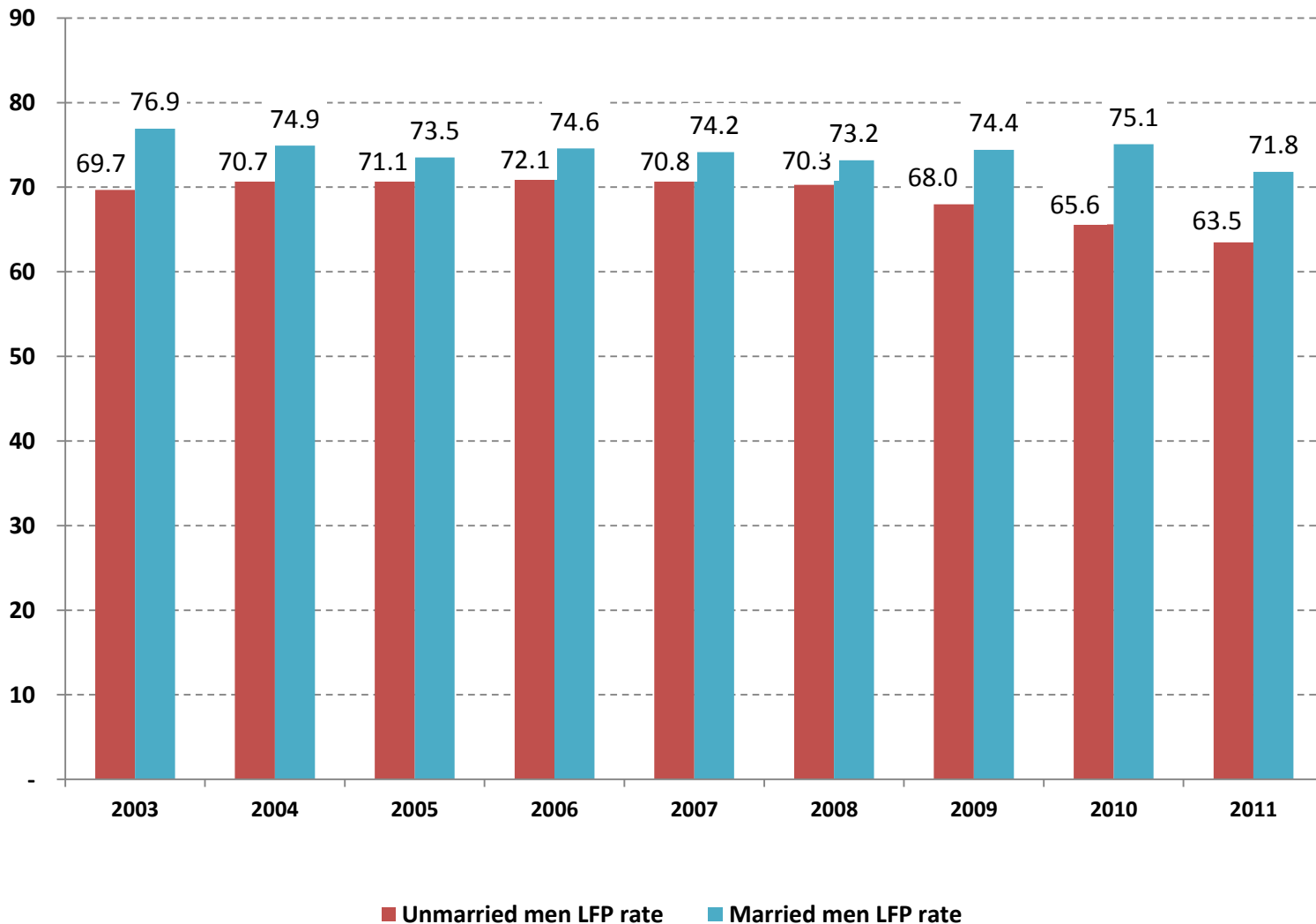
Percent



Labor Force Participation Rate

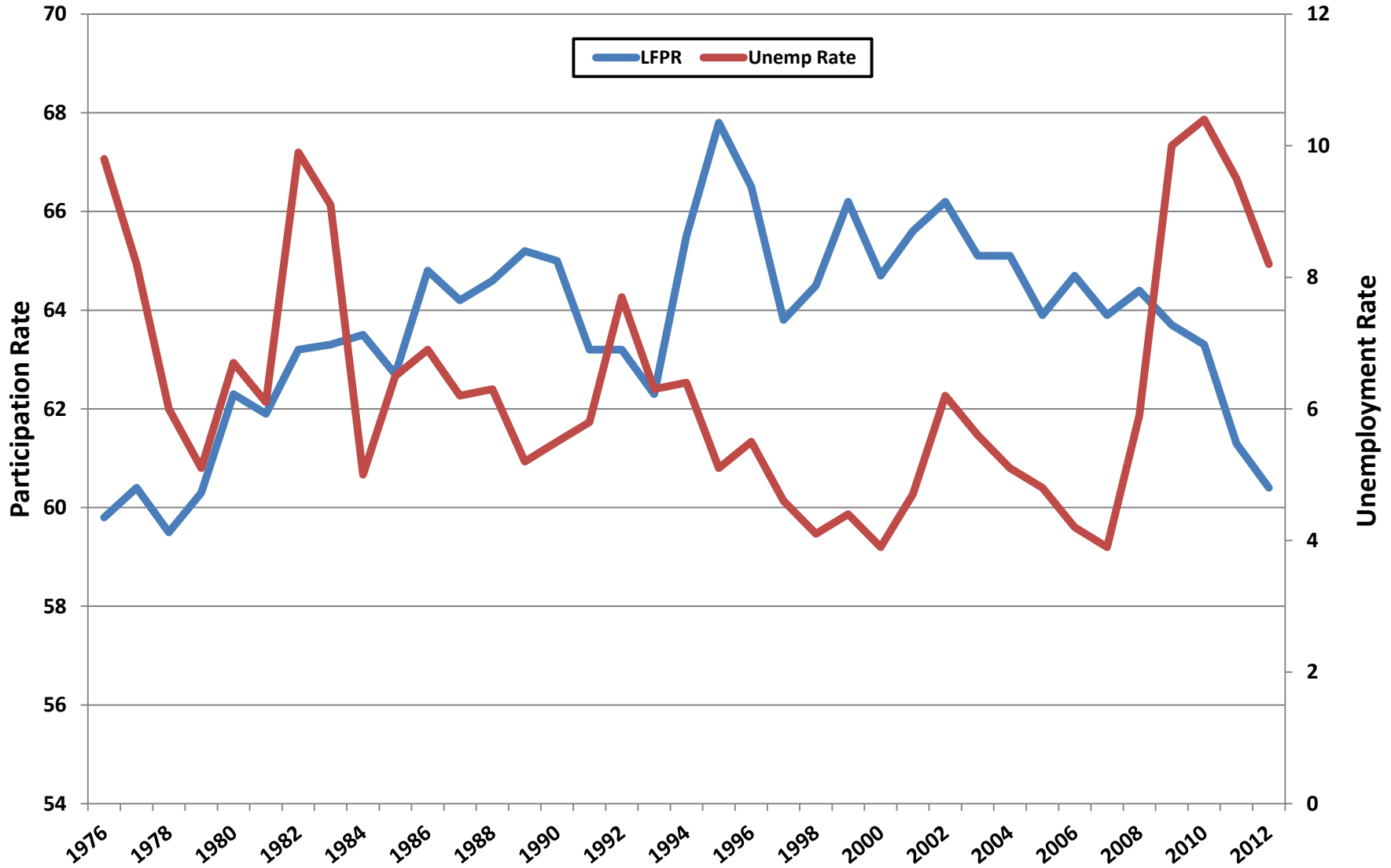
Unmarried Men vs Married Men, Arizona

Percent



LFPR and Unemployment Rate

Arizona, 1976-2012



A light blue map of the state of Wyoming is centered in the background. A dark blue horizontal banner is superimposed across the middle of the map.

Industry Forecast

Employment Forecast

(In Thousands)

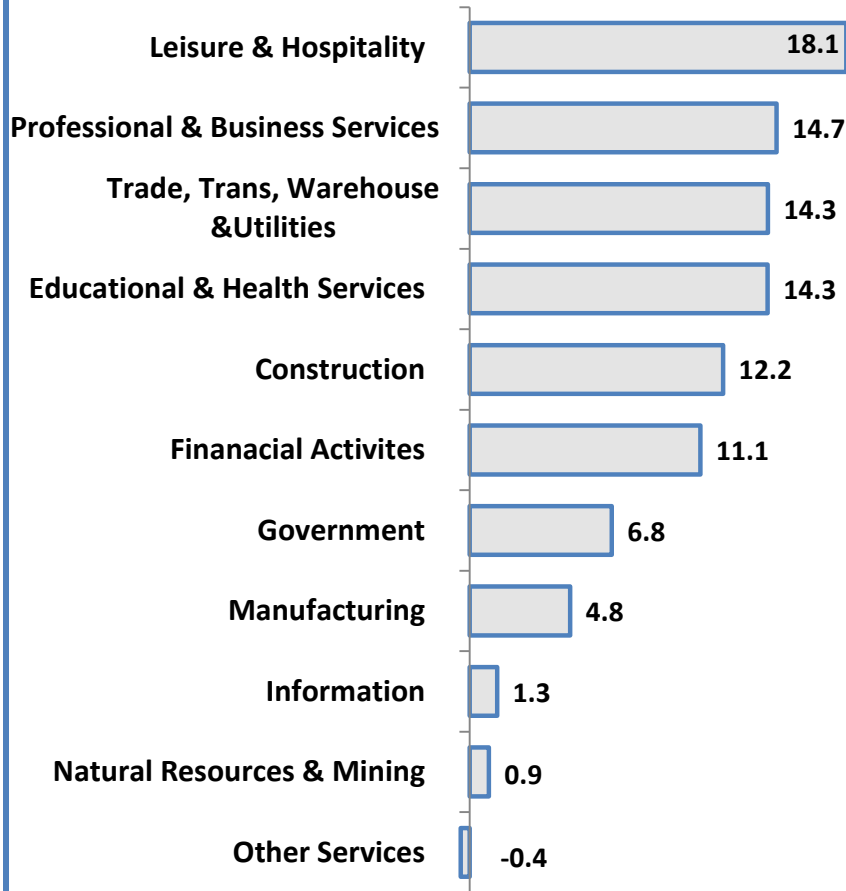
Arizona

	<u>Historical</u>			<u>Forecast</u>		
	2010	2011	2012	2013	2014	2020
Total Nonfarm	2385.8	2411.4	2460.3	2506.8	2558.6	2894.0
<i>Numerical Change</i>	-46.8	25.6	48.9	46.5	51.8	512.0
<i>Percent Change</i>	-1.9%	1.1%	2.0%	1.9%	2.1%	21.5%

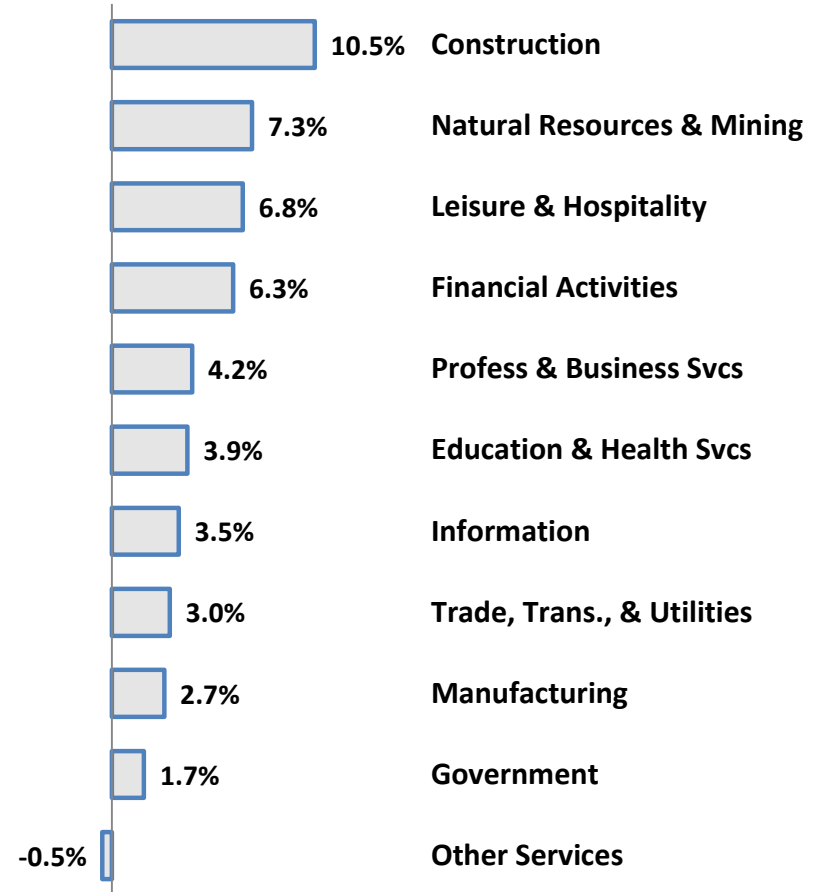
✓ Nonfarm jobs gains of 46,500 in 2013 and 51,800 in 2014 is forecast. A total of 98,300 jobs are forecast to be gained over the two year period (2012-2014)

✓ OTY Nonfarm employment growth rate of 1.9% in 2013 and 2.1% in 2014 is forecast

2012-2014 Job Gains by Sector Arizona Employment Level



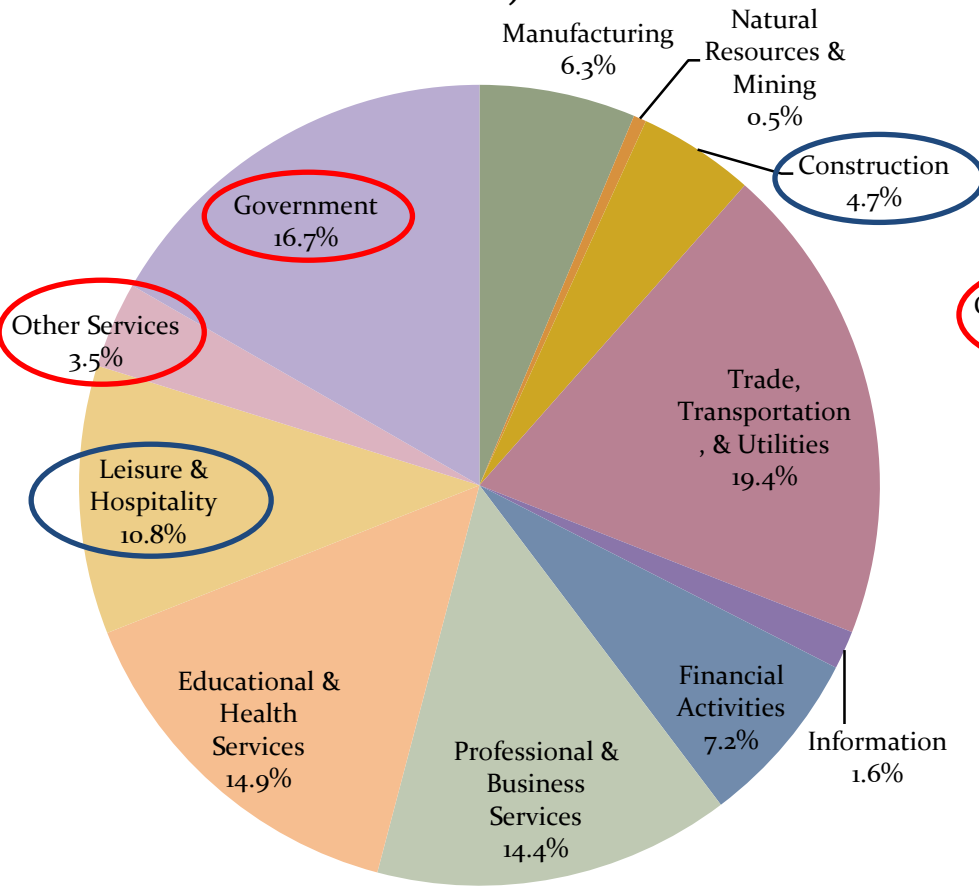
2012 to 2014 Job Gains by Sector Arizona Percentage Growth



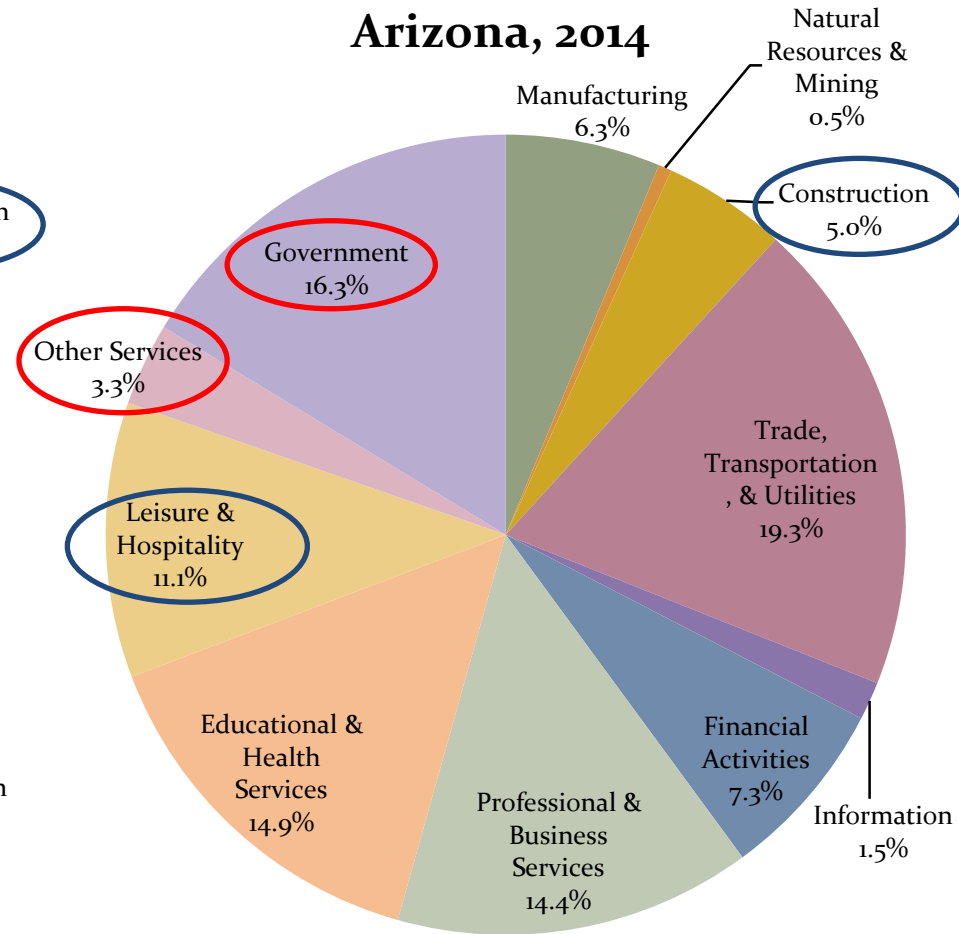
Largest job gains in Leisure & Hospitality;
Largest Rate of Growth in Construction

Share of Nonfarm Employment by Industry

Arizona, 2012



Arizona, 2014



Total Nonfarm Employment Annual Average Growth Rate

	2012 ^(a)	2013 ^(b)	2014 ^(b)	
Arizona	2.0%	1.9%	2.1%	
Phoenix MSA ¹	2.4%	2.3%	2.4%	← Slightly Faster Growth
Tucson MSA ²	1.5%	0.8%	1.1%	
Balance of State	0.6%	0.8%	1.3%	← Slower Growth

1) Maricopa and Pinal counties

2) Pima County

3) Arizona less Maricopa, Pinal and Pima counties

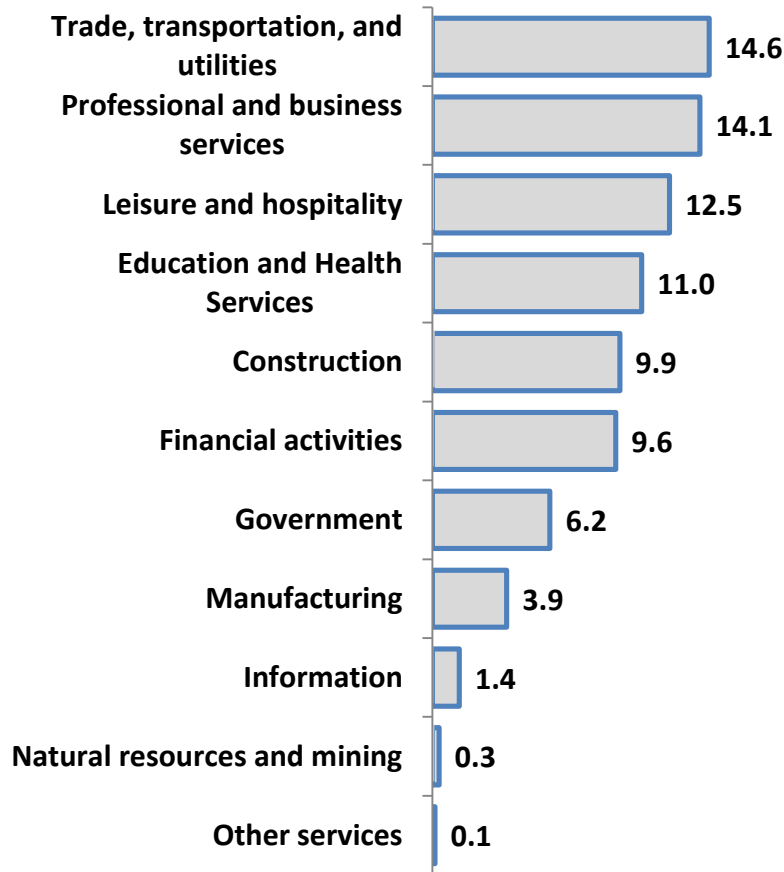
a) Historical

b) Forecast

OTY growth rate for Nonfarm emp. slightly faster in Phoenix, and slower in Tucson and Balance of State

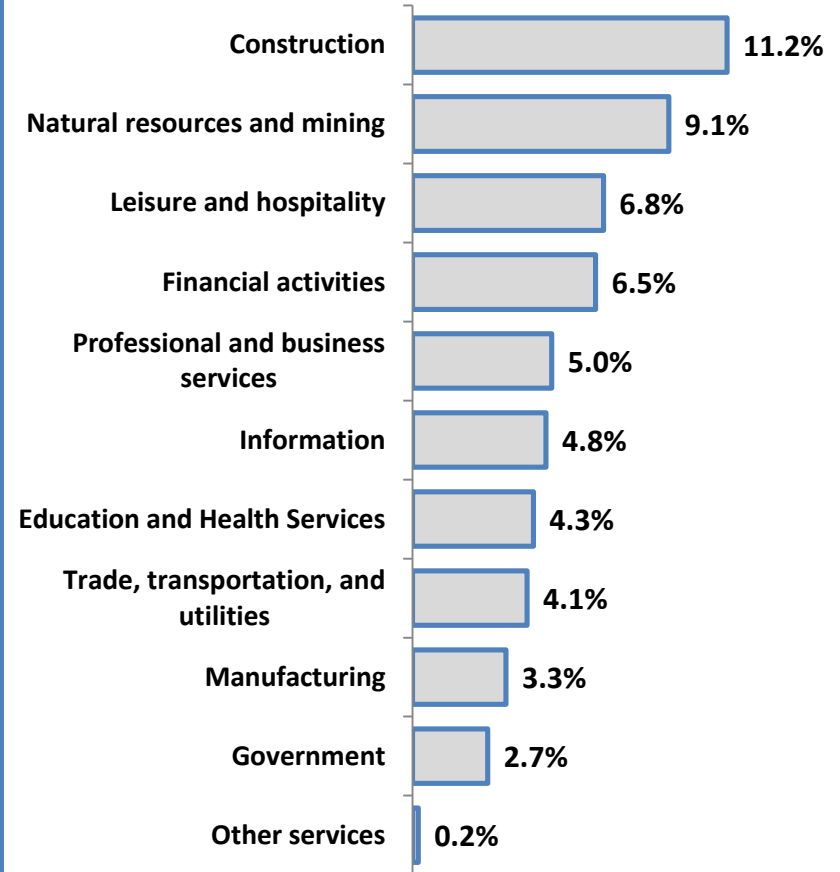
2012-2014 Job Gains by Sector

Phoenix MSA Employment Level (thousands)



2012-2014 Job Gains by Sector

Phoenix MSA Employment Percentage



Largest job gains in Trade Transportation and Utilities;
Largest Rate of Growth in Construction

A light blue map of the state of Washington is centered in the background. The map shows the state's outline, including the jagged coastline on the west and the panhandle on the north. A dark blue horizontal banner is superimposed over the middle of the map.

Occupational Trends & Forecast

Occupation Forecast Defined

- While industry employment estimates are categorized by what an industry (aggregation of firms) does, the occupational estimates are categorized by what the worker does
- Occupation projections are produced using industry projections
 - Staffing Patterns within each industry, in conjunction with industry projections, are used to create occupation projections

Short-Term Projections

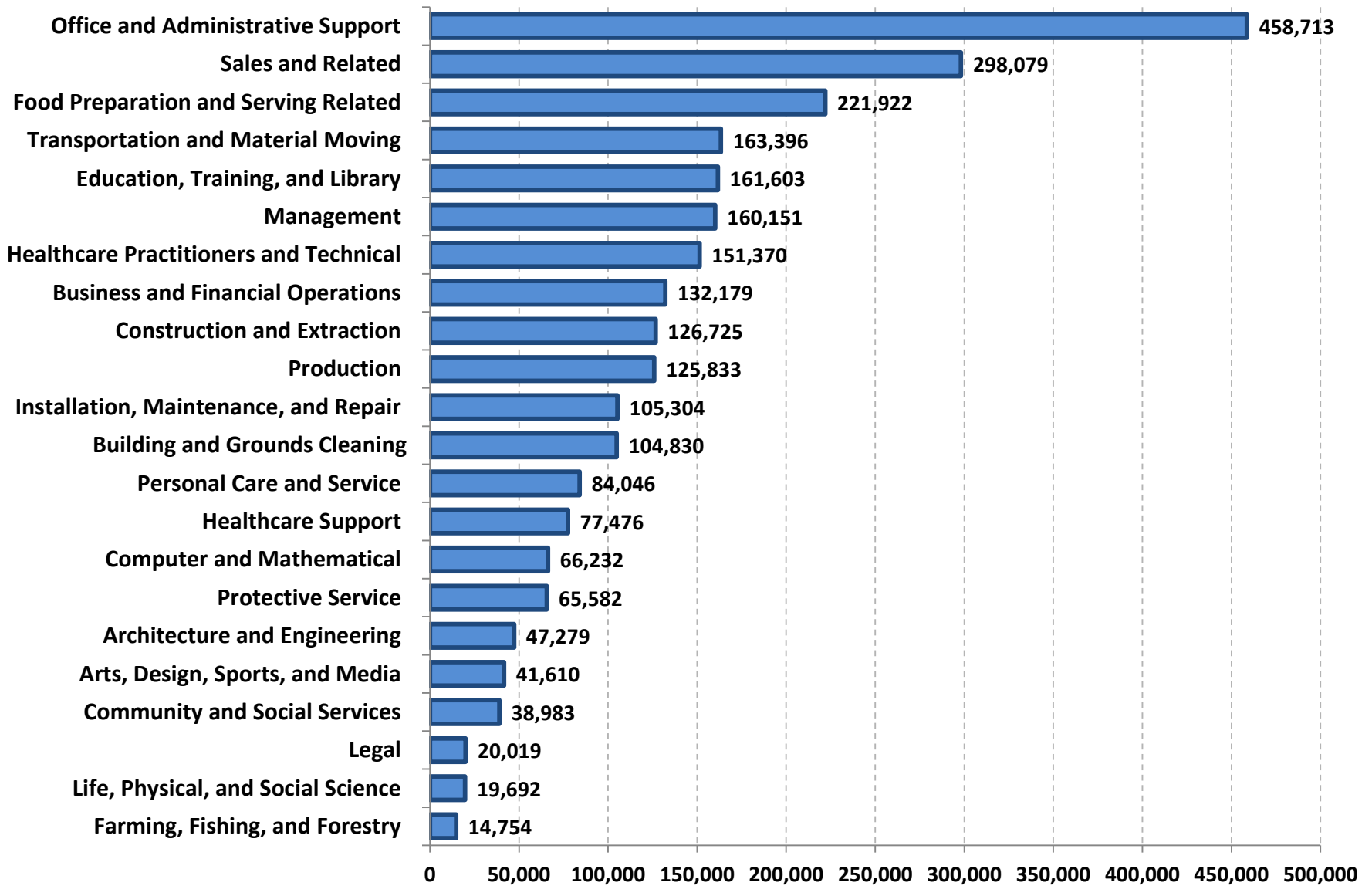
- Annual Publication
- Two-Year Period (2012-2014)

Long-Term Projections

- Biannual Publication
- Ten-Year Period (2010-2020)

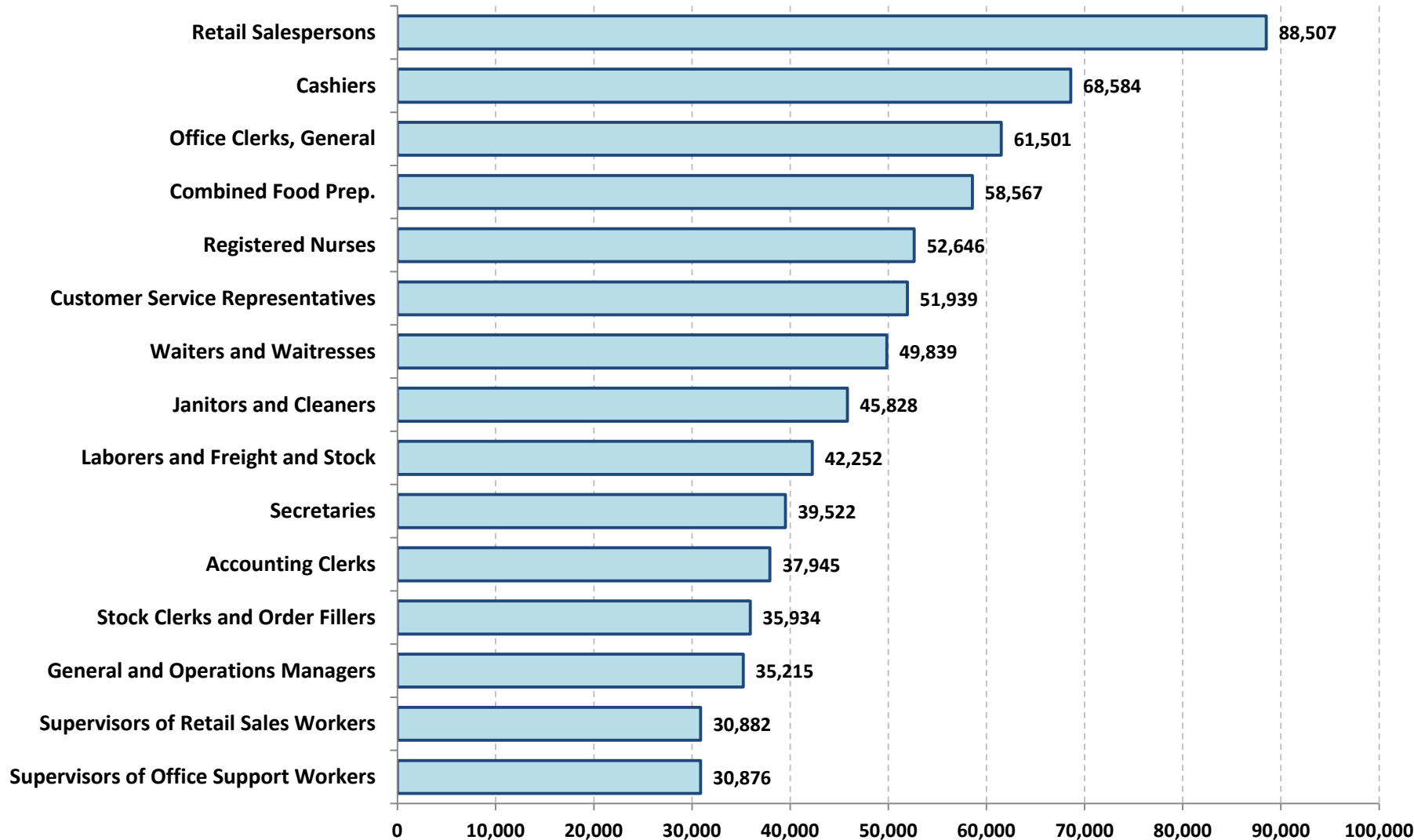
Major Occupational Groups

Arizona, 2012 Total Employment



Detailed Occupational Groups (15 Largest)

Arizona, 2012, Total Employment

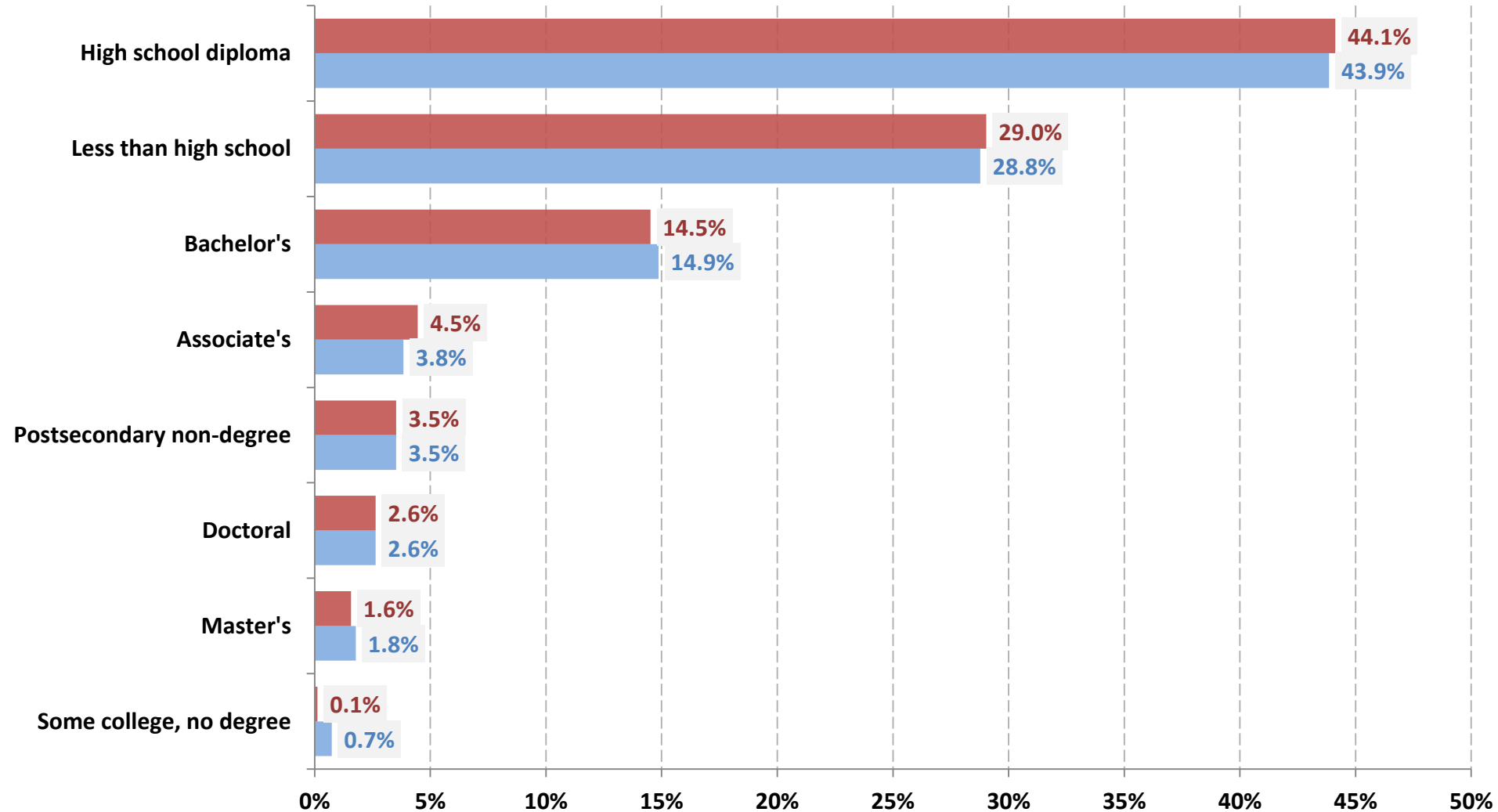


Data Source: Bureau of Labor Statistics
Occupational Employment Statistics

Employment Share by Education Requirement

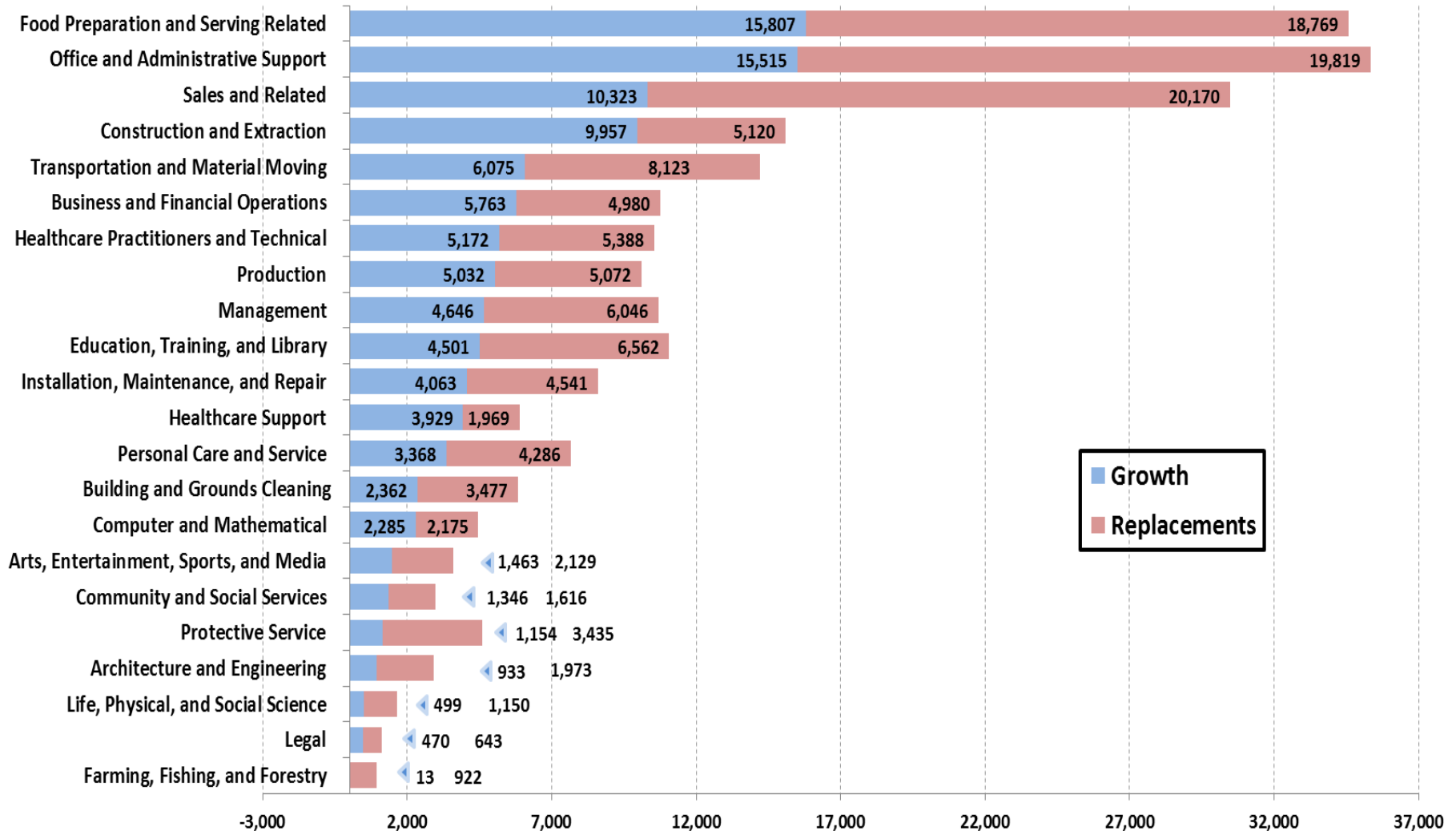
2012 Estimates

ARIZONA US



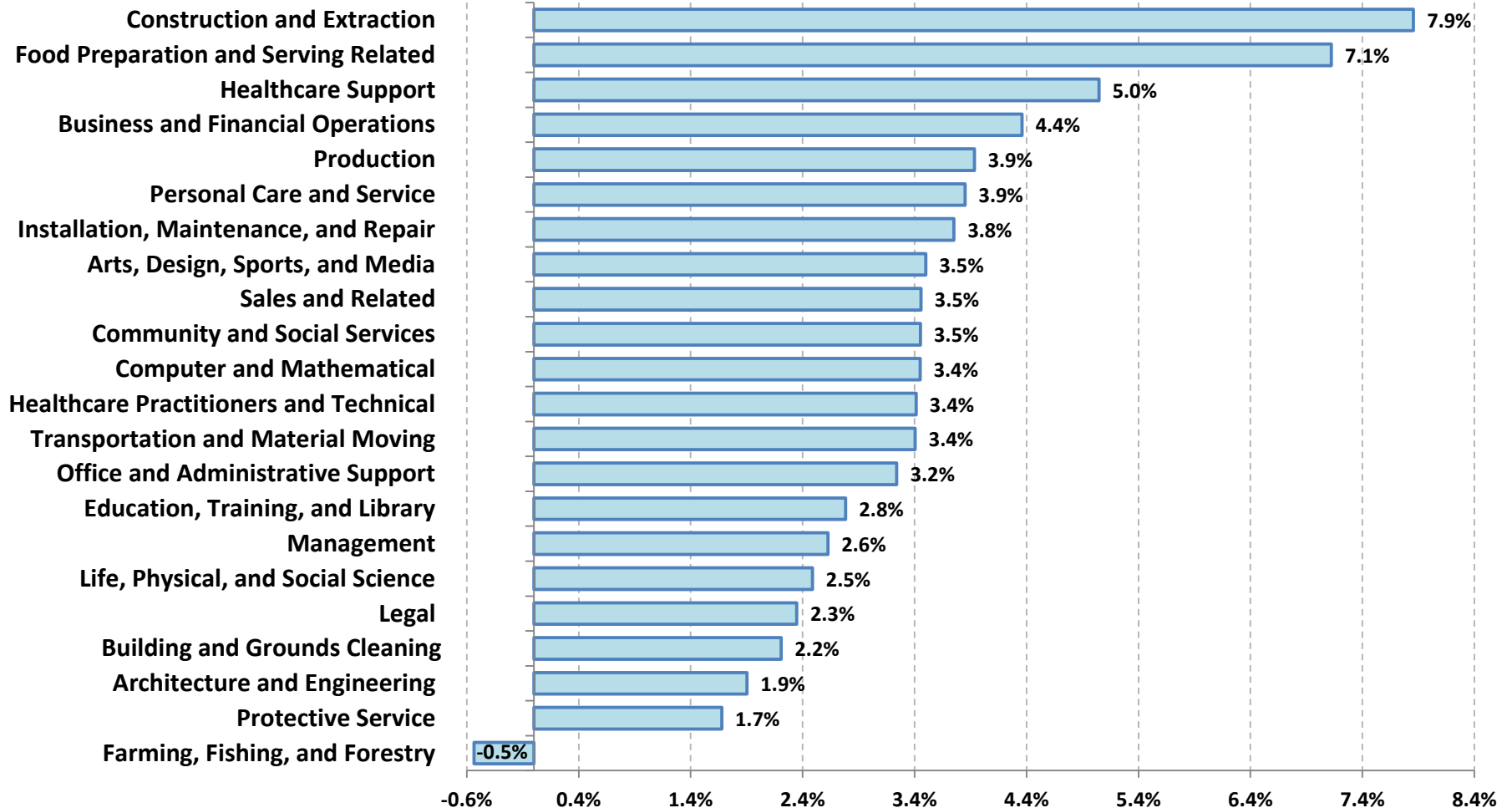
Major Occupations Ranked by Total Openings (growth vs replacement)

Arizona, 2012-2014



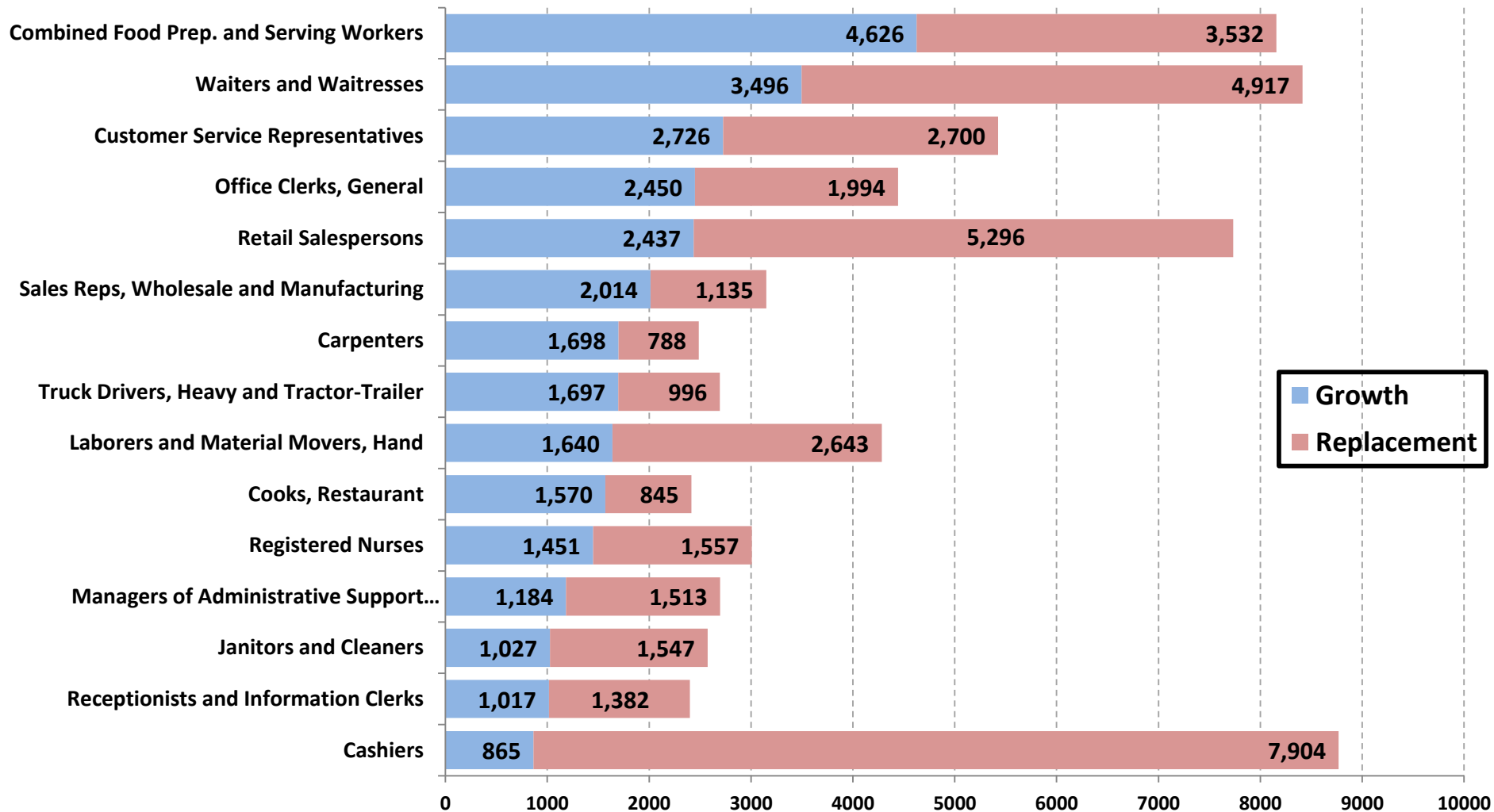
Major Occupations Ranked by Growth Rate

Arizona, 2012-2014



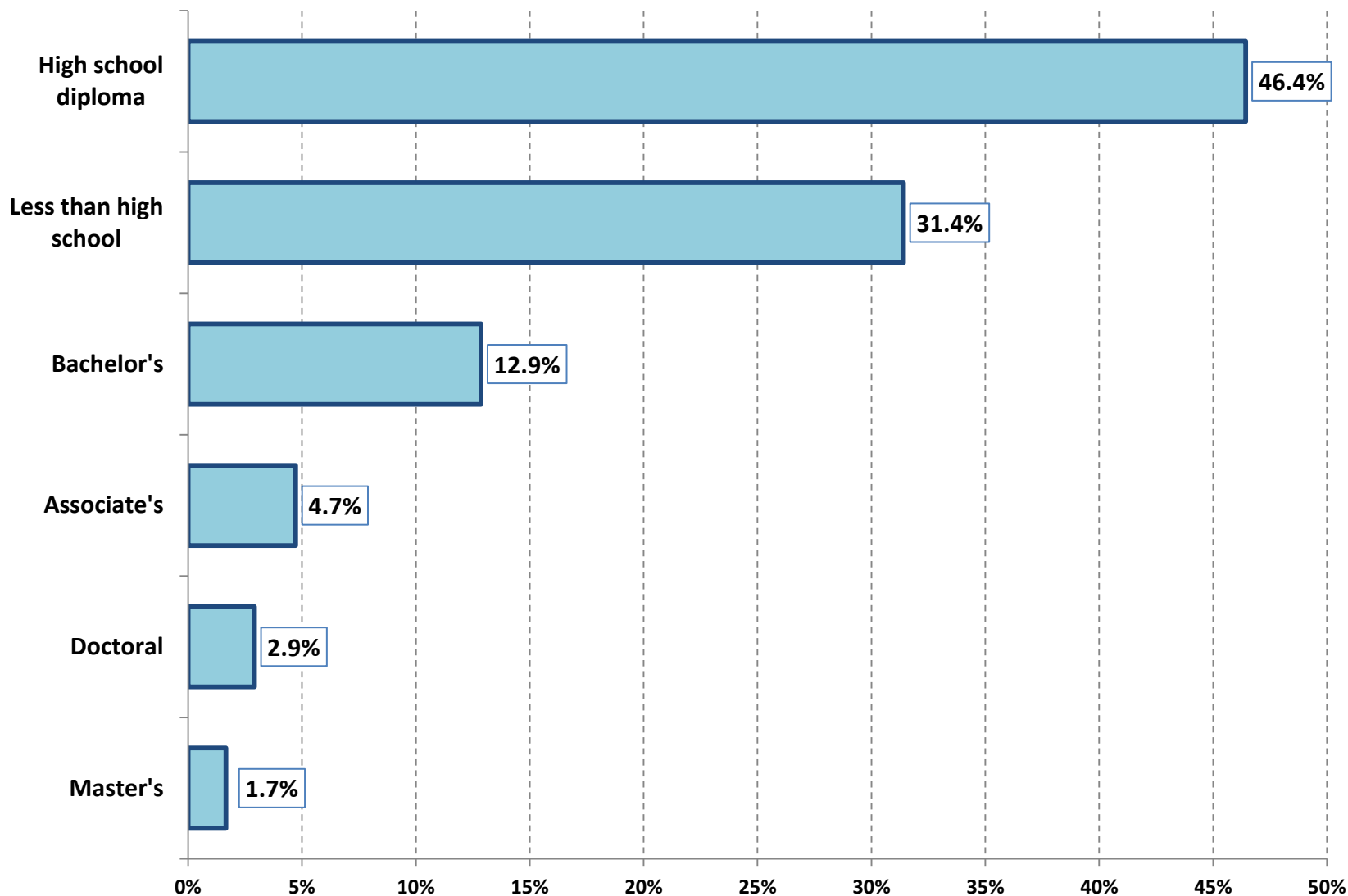
Detailed Occupations Ranked by Total Openings (growth vs replacement)

Arizona, 2012-2014



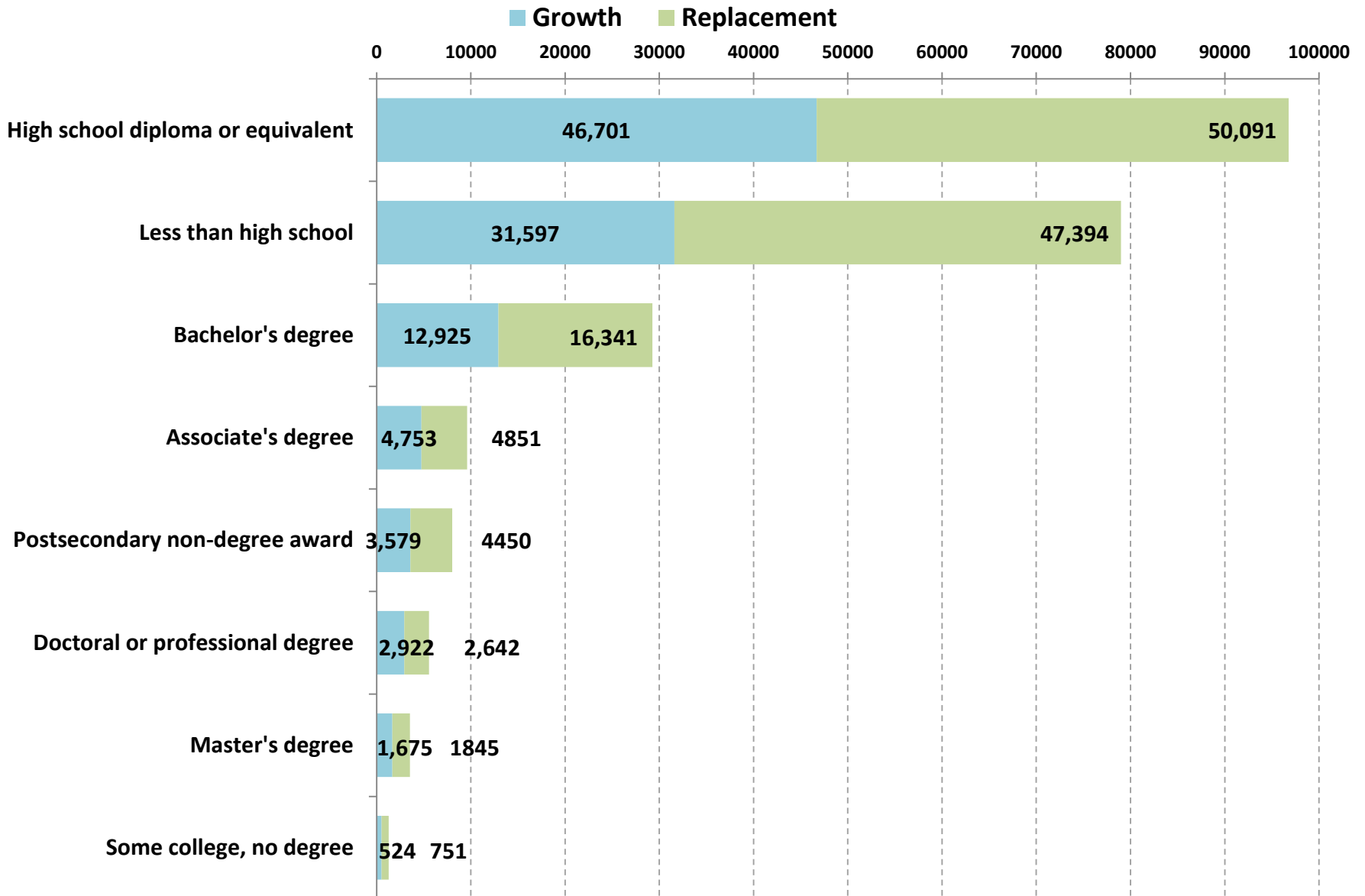
Share of All Openings by Educational Requirement

Arizona, 2012-2014



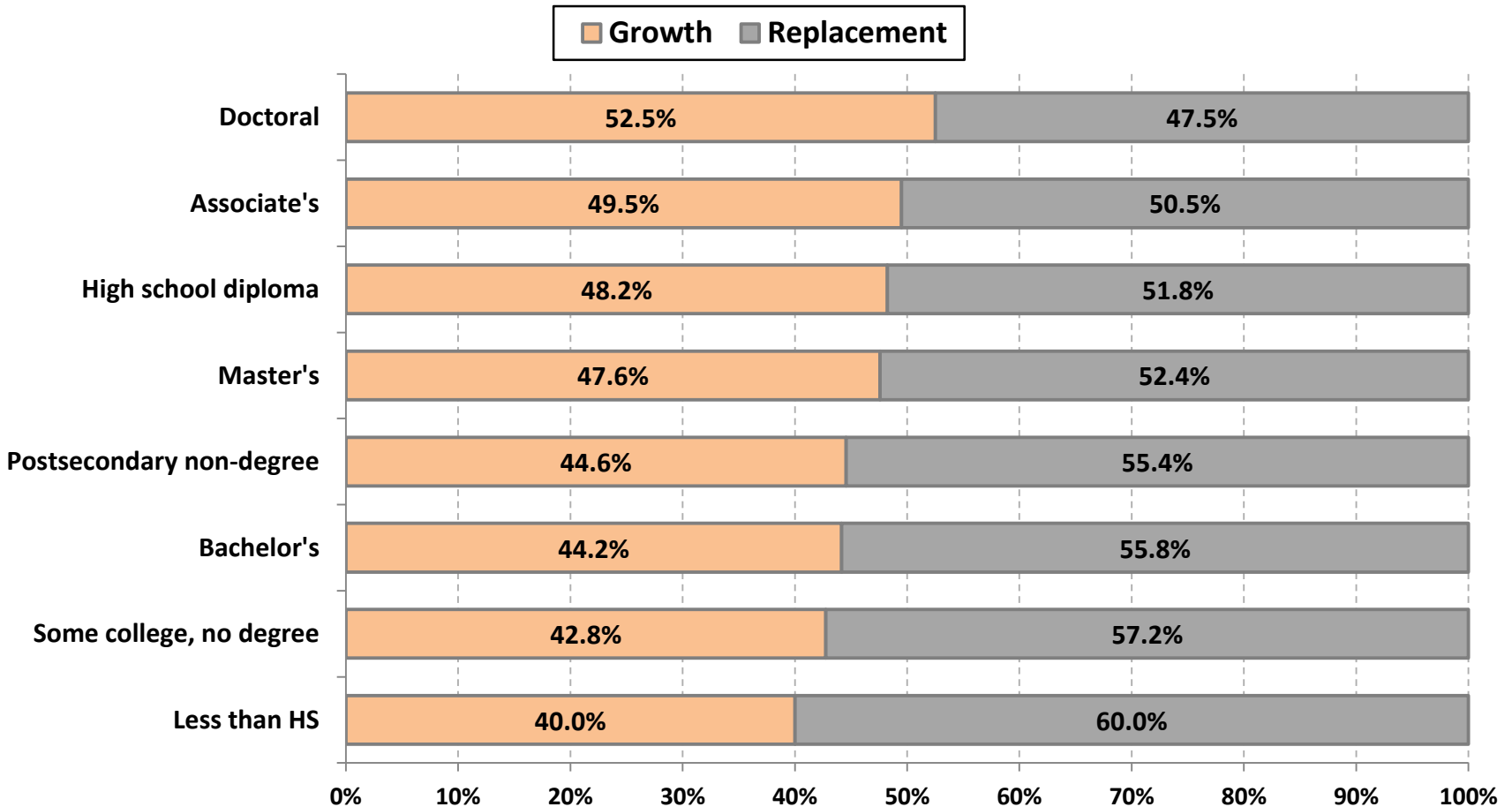
Openings by Educational Requirement

Arizona, 2012-2014



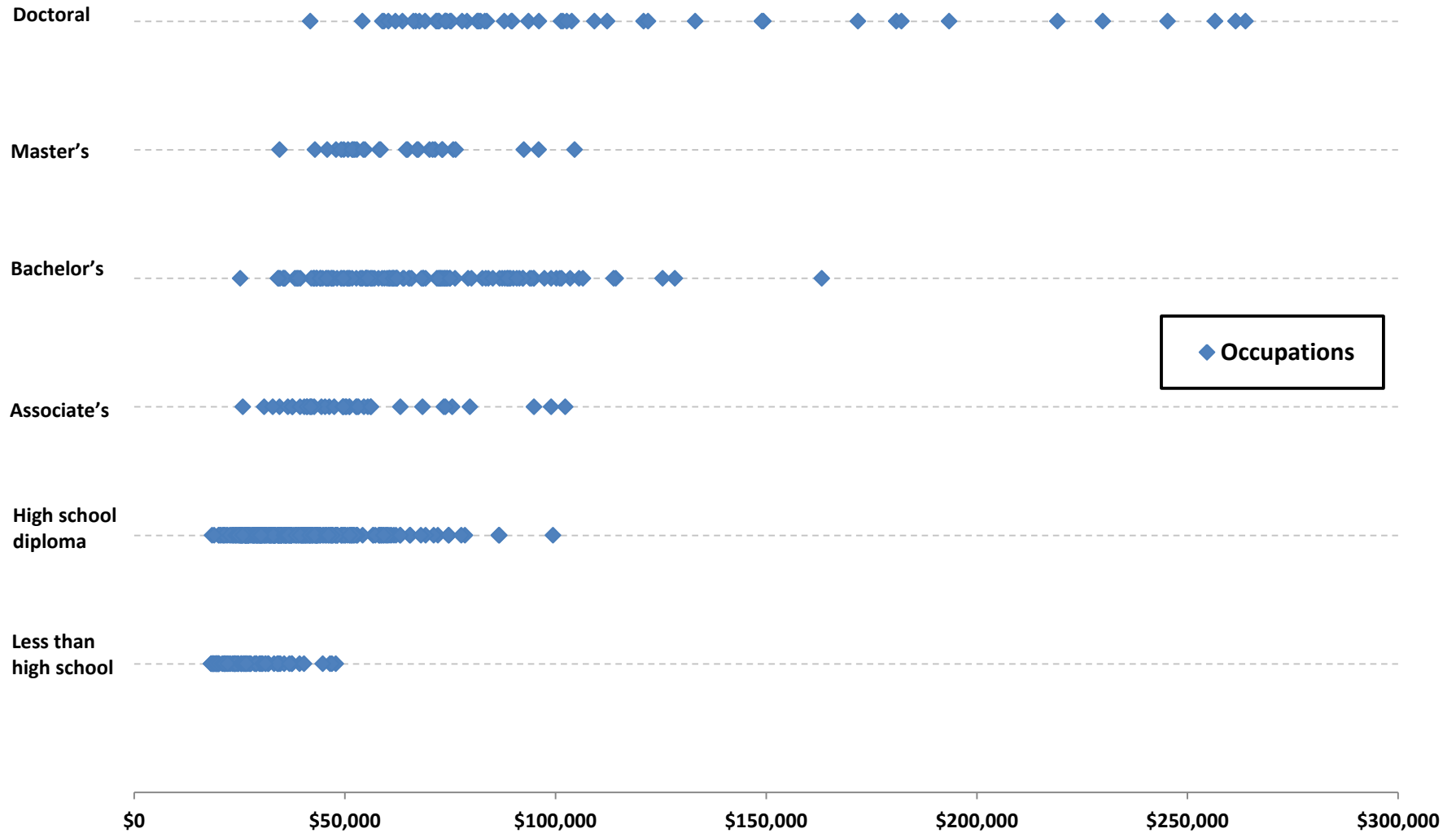
Openings by Minimum Education Requirement (growth vs replacement)

Arizona, 2012-2014



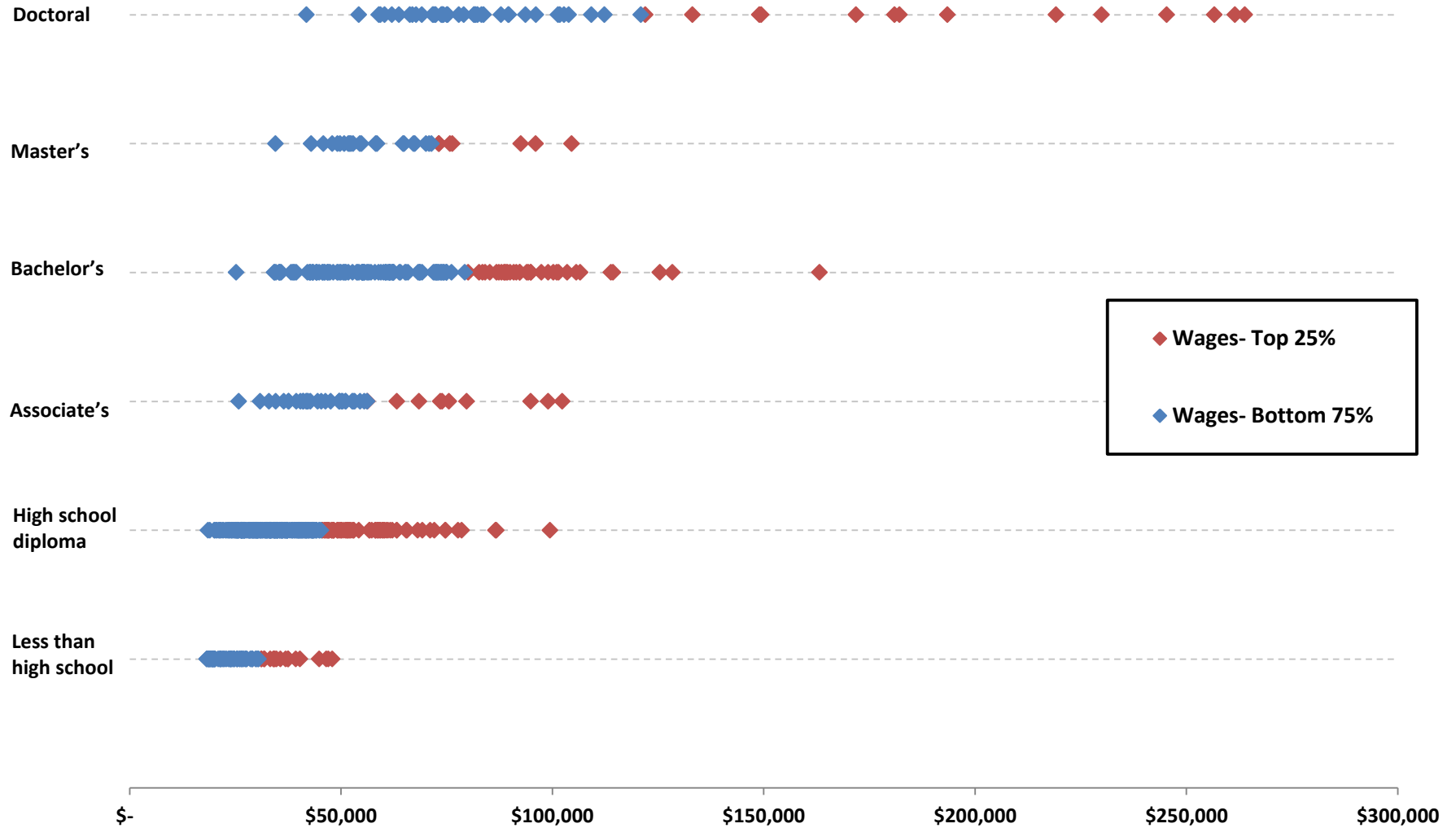
Mean Annual Wage by Education Requirement

Arizona, 2012



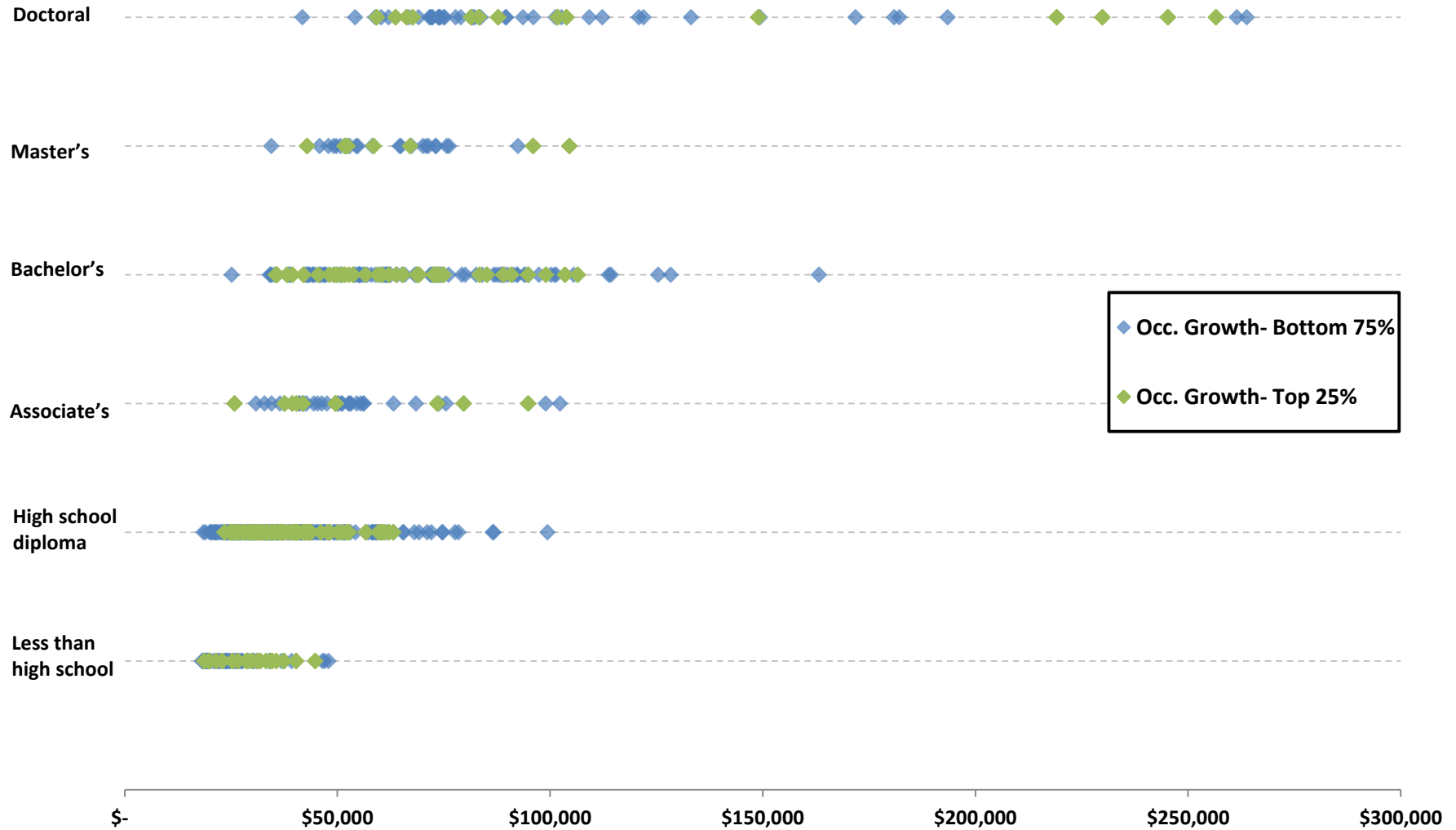
Mean Annual Wage by Education Requirement

Arizona, 2012



Mean Annual Wage by Education Requirement

Arizona, 2012



High-Wage Occupations by Education Requirement

Arizona, 2012

Less Than High School	
Rotary Drill Operators	\$47,892
Traffic Technicians	\$46,970
Carpet Installers	\$46,515
High School Diploma	
Criminal Investigators	\$78,509
Power Distributors	\$77,685
Real Estate Broker	\$74,689
Associate's Degree	
Air Traffic Controller	\$102,342
Dental Hygienist	\$79,696
Radiation Therapist	\$75,511

Bachelor's Degree	
Engineering Managers	\$128,383
Marketing Managers	\$114,319
Actuaries	\$106,540
Master's Degree	
Education Administrator	\$104,557
Physician Assistant	\$96,036
Occupational Therapist	\$76,297
Doctoral Degree	
Oral Surgeon	\$263,806
Orthodontist	\$261,469
Anesthesiologist	\$256,575



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